



Cost Management

The screenshot displays the Autodesk BIM 360 Cost Management interface. On the left, a table lists 'Approved Change Orders' with columns for 'Amount' and 'Total'. The table contains several rows of data, including values like 1,394,321.71, 745,732.08, 367,100.77, 0.00, 476,963.49, 331,963.49, 0.00, 85,131.66, 85,131.66, 0.00, 895,629.92, 897,829.92, 0.00, 565,648.71, 565,648.71, 0.00, 367,648.29, 367,648.29, 0.00, 17,353.339, 17,353.339, 700,000.00, 2,832,849.00, 2,832,849.00, 0.00, 254,900.67, 254,900.67, 0.00, 1,070,000.00, 1,070,000.00, 1,273,000.00, 0.00, 35,250.66, 35,250.66, 0.00, 725,216.12, 725,216.12, 0.00, 541,827.33, 541,827.33, 0.00, 23,099.08, 23,099.08, 0.00, 76,740.26, 76,740.26, 0.00, 688,991.17, 688,991.17, 0.00.

On the right, the 'FINANCIAL' section shows 'Award Amount: 565,648.71' and 'Total: 565,648.71'. Below this, the 'SCOPE OF WORK' section is empty. The 'SUPPLIER DETAILS' section includes fields for 'Name' and 'Contact', both with 'Select...' dropdown menus. The 'DOCUMENT BY RECIPIENT' section states 'There are no available documents.' and includes a 'Generate...' button. The 'APPROVAL' section shows 'Created By: Ian Turner' and 'Purchased By: Ian Turner', with 'Changed By: Ian Turner' and 'Signed By: Ian Turner' also visible.

Introduction

Tracking costs, managing risk, and keeping a project on budget can be one of the biggest hurdles in a construction project, and finding efficiencies in this area can make all the difference in delivering a project on time and on budget.

But with the new BIM 360 Cost Management module bringing powerful cost control, change management, and pay application

workflows to the BIM 360 platform teams can minimize risk by managing all cost related construction activities in a single software.

The following guide introduces the BIM 360 suggested cost management workflow and gives context to the different capabilities built into the product, including step-by-step starter guides.

Autodesk BIM 360

BIM 360 improves the process of construction by supporting informed decision making throughout the project lifecycle. It does this by centralizing all project data in a single data repository and connecting project stakeholders and workflows—from design to construction to operations, from the field to the office and back.

Visit BIM 360 Site



Please note that the capabilities outlined in this guide are reflective as of January 2020 and will continue to undergo improvements. Additionally, some capabilities are only available in certain countries. For more information on product updates and capabilities please visit the [BIM 360 Product Release Notes](#).



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- Account Admin
- Integration Partners



Suggested Workflow

Cost Management Workflow

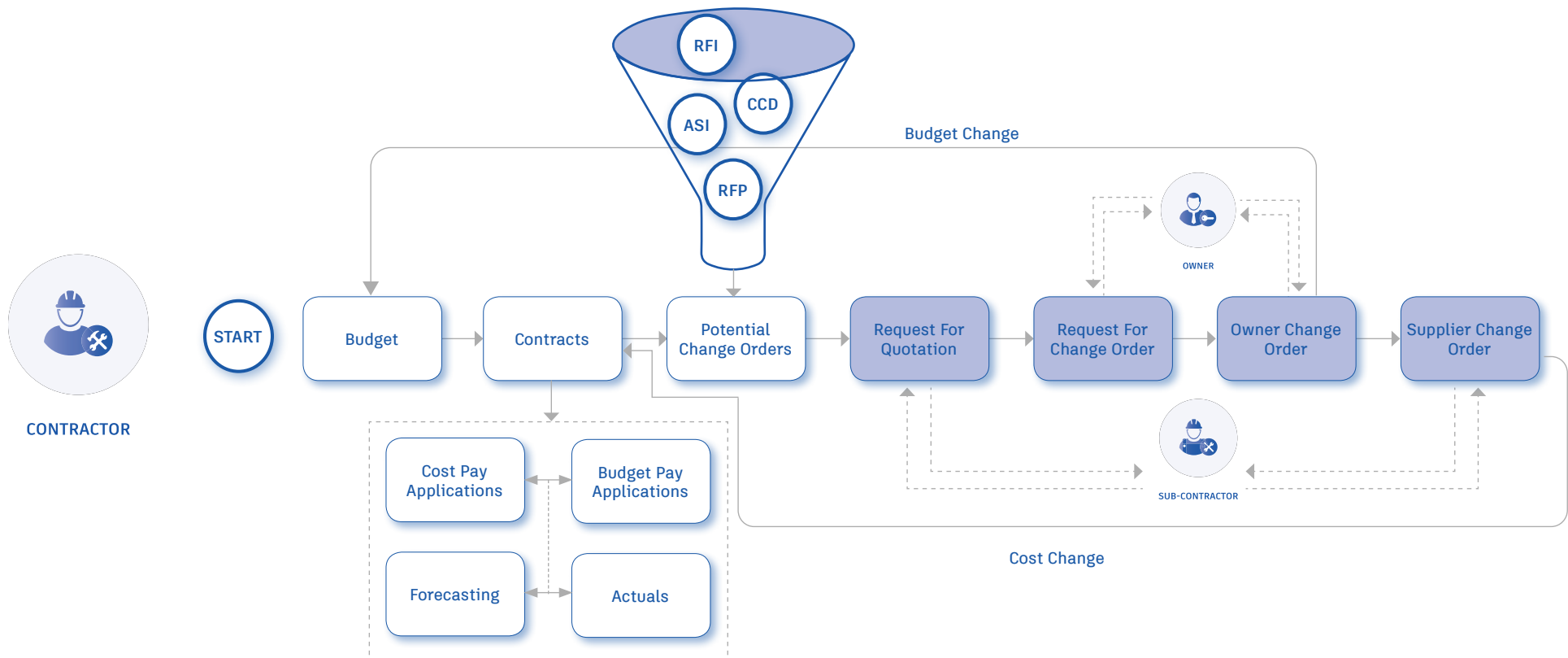
Used to help control cost and confirm all changes are accounted for and managed effectively to maintain positive cash flow, reduce risk and maximize profit. The graphic below outlines the suggested cost management workflow using BIM 360.

Why follow this workflow?

- Customizable to suit users needs and preferences
- Provides a real-time summary view of all budget items and contracts
- Streamlines upstream and downstream change order workflows

BIM 360 capabilities used

- Budget management
- Contract management
- Change mrder management
- Pay applications
- Forecasting
- Actuals



Pay Application Workflow

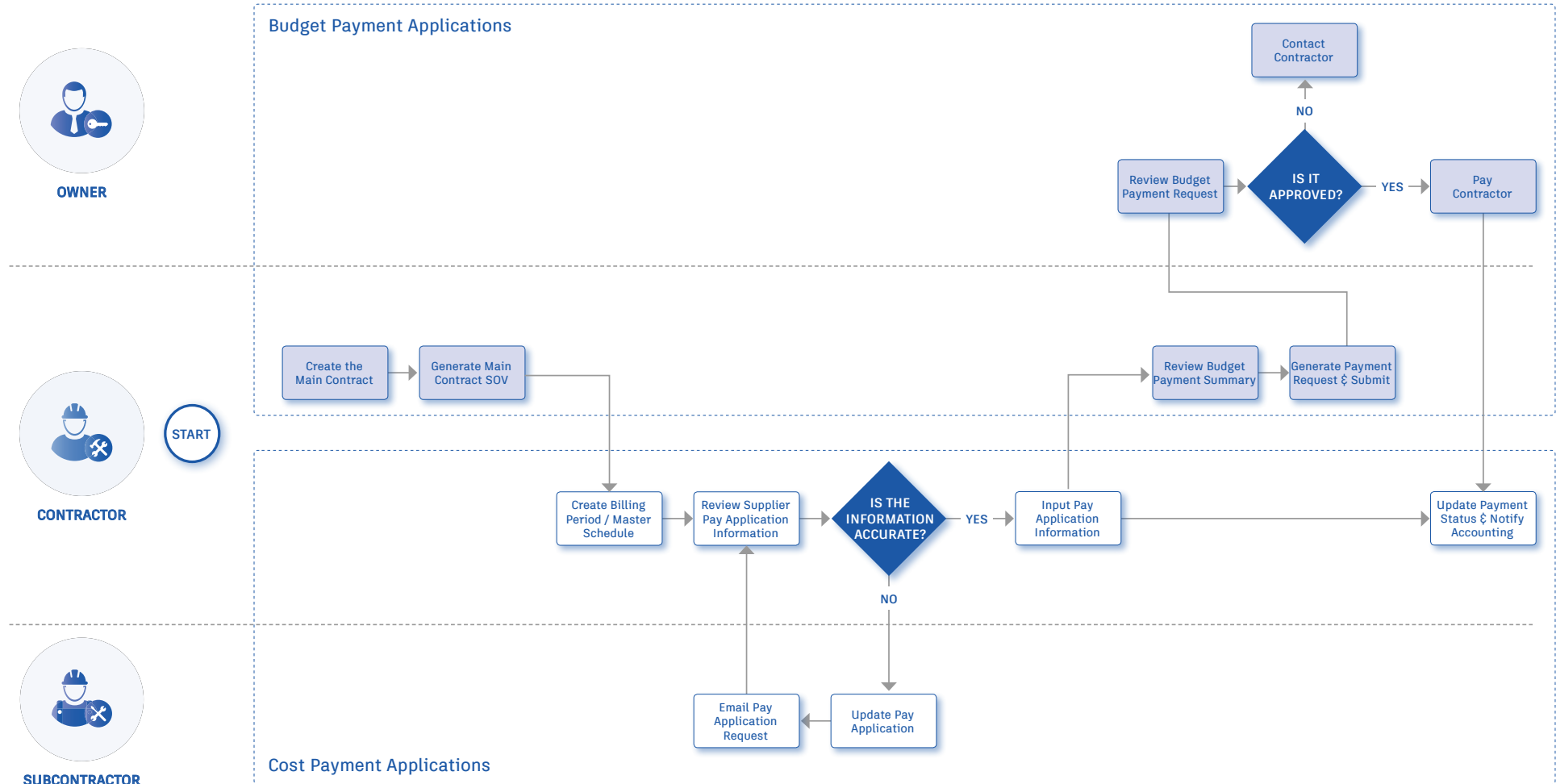
Used to help effectively manage incremental pay applications to automate tasks and gain a real-time view of the financial health of the project. The graphic below outlines the suggested pay application workflow using BIM 360.

Why follow this workflow?

- Adds a level of automation
- Easy to manage and track
- Provides a real-time summary view of all cost and budget payments

BIM 360 capabilities used

- Main contract & budget items
- Budget payment applications
- Cost payment applications



Cost Management Capabilities

Budget Code Setup

Cost Management is customizable to suit your needs and preferences including detailed hierarchical build ups, custom segment options, and master lists.



1 Activate the Cost Management Module

- A project admin needs to activate the Cost Management module.
- In the Project Admin module select the “Services” tab, then “Overview” on the left sidebar.
- In the Cost Management row, select “Activate” and designate at least one project admin.

PRO TIP: The Document Management module needs to be activated first.

A screenshot of the 'Project Admin' interface, specifically the 'SERVICES' tab. The left sidebar shows a navigation menu with 'Overview' selected. The main content area is titled 'Project Services and Admins' and contains a table of project services. The table has columns for status, name, and actions. The 'Cost Management' row is highlighted, and its status is 'Active'. Below the table, there is a form to add or remove service admins, with a dropdown menu showing 'Cassie Bustos' and a text input field for 'Enter name or email address'. There are 'Cancel' and 'Save' buttons. At the bottom right, there is a green 'Feedback' button.

Status	Module Name	Action
Active	Document Management	Show Admins
Active	Project Management	Show Admins
Active	Cost Management	Hide Admins
Inactive	Design Collaboration	Activate
Active	Model Coordination	Show Admins
	Field Management	Show

Budget Code Setup

2 Budget Code Templates

The “Budget Code Setup” informs BIM 360 how the budget codes should appear in the Cost Management module. Within this tab, you can build the budget code format from scratch or by importing an excel list from an accounting system or similar. Only project admins can create budget code templates.

- In the Project Admin module, select the “Services” tab.
- On the left sidebar select “Cost Management” then “Budget Code Setup.”
- Use the “Budget Code Template” field to label the template.

The screenshot shows the 'Project Admin' interface with the 'Services' tab selected. The 'Budget Code Setup' sub-tab is active. In the 'Template' section, the 'Budget Code Template' field is highlighted with an orange box, showing 'Custom Template'. To the right is a 'Budget code preview' field. Below this is the 'Segments' section, which includes an 'Add New' button and a table with columns for 'Where', '# of Digits', and 'Delimiter'. A 'Segment code preview' field is also present.

3 Creating Budget Segments

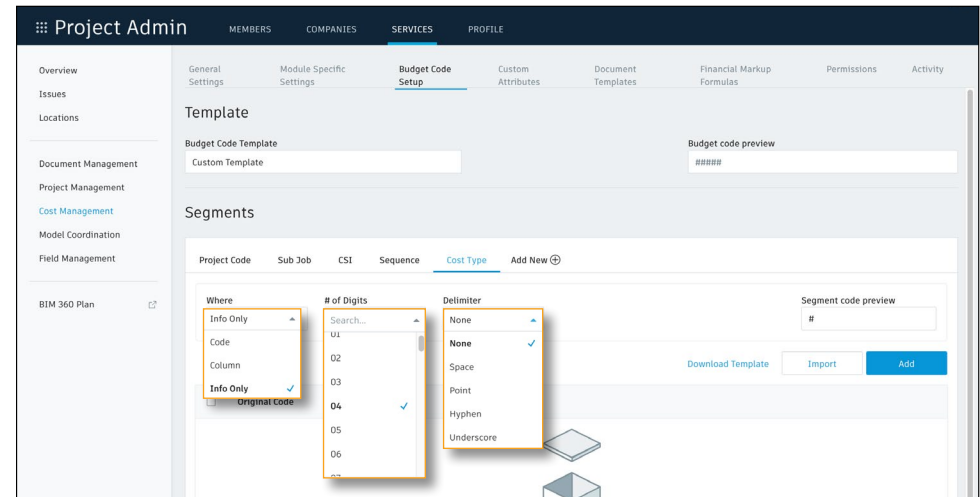
- In the Segment section select “Add New” and double-click to rename the segment.
- At a minimum there must be least one segment, but you can create as many segments as required.
- Click and drag the segment tabs to rearrange.

This screenshot shows the same 'Project Admin' interface, but with the 'Segments' section expanded. The 'Add New' button is highlighted with an orange box. Below it, a table is visible with columns for 'Original Code', 'System Code', and 'Description'. The 'Where' dropdown is set to 'Code', '# of Digits' is '01', and 'Delimiter' is 'None'. The 'Segment code preview' field now shows a hash symbol '#'. The 'Add' button is now visible at the bottom right of the segment configuration area.

Budget Code Setup

4 Adding Budget Segment Details

- “Where” informs BIM 360 on how to show the segment:
 - **Code** - as part of the whole budget code.
 - **Column** - in a separate column from the budget code.
 - **Info only** - purely for information and not shown in the budget columns.
- “# of Digits” informs BIM 360 how many digits are expected for that segment.
- “Delimiter” informs BIM 360 how to separate the segments if at all.



PRO TIP: You can't edit segments when there are budget items in the project.

5 Adding Segment Values

- Segment values can be added individually by selecting “Add” or by importing a master list.
- When importing a master list you can either drag and drop or browse for an Excel sheet.
- When importing a list first down a template by clicking “Download Template.”
- Hierarchy levels are unlimited. Child levels don't require a column header; just insert a column for each level of hierarchy.
- Note, every line item can only have one code.

Excel template:

Code	Description
000000	Procurement and Contracting Requirements
001000	Solicitation
001100	Advertisements and Invitations
002000	Instructions for Procurement
002100	Instructions
002200	Supplementary Instructions

Results in the budget code setup tab:

<input type="checkbox"/> Code ^	Description
<input type="checkbox"/> 000000	Procurement and Contracting Requirements
<input type="checkbox"/> 001000	Solicitation
<input type="checkbox"/> 001100	Advertisements and Invitations
<input type="checkbox"/> 002000	Instructions for Procurement
<input type="checkbox"/> 002100	Instructions
<input type="checkbox"/> 002200	Supplementary Instructions

Example budget flyout view where you can see the benefits/results of the master lists import:

Envelope package		
84720010722000SUB		
BUDGET CODE DETAILS		
Segment Name	Code	Description
Project Code	8472	8472
Sub Job	001	001
CSI	072200	Roof and Deck Insulation
Sequence	0	0
Cost Type	SUB	Subcontractor

Download Setup Templates

Budget Code Setup

6 Code Preview

- The “Segment Code Preview” field allows you to input example data to confirm the segment code details are accurate.
- The “Budget Code Preview” displays a preview of the entire budget code as it will be shown in the Cost Management module.
- If you hover over the “Budget Code Preview” an “Input Code Preview” pops up to display the code as it might look when imported into Cost Management from your accounting system.

The screenshot shows the 'Project Admin' interface with the 'BUDGET CODE Setup' tab selected. The left sidebar contains navigation links: Overview, Issues, Locations, Document Management, Project Management, Cost Management (highlighted), Design Collaboration, Model Coordination, and Field Management. The main content area is divided into 'Template' and 'Segments' sections. In the 'Template' section, there is a 'Budget Code Template' field with a 'Custom Template' dropdown. To the right, a 'Budget Code Preview' field displays '001.033000.1[SUB]#'. A tooltip labeled 'Input Code Preview' with the value '847200100100010UBB' is visible. The 'Segments' section has tabs for 'Project Code', 'Sub Job', 'CSI', 'Sequence', 'Cost Type', and 'Segment 5'. Under 'Project Code', there are fields for 'Where' (Info Only), '# of Digits' (04), and 'Delimiter' (None). A 'Segment Code Preview' field shows '8472'. At the bottom, there is a table with columns 'Code' and 'Description'. The table contains two rows: one with '1212' and '1212', and another with '8472' and '1212'. Buttons for 'Download Template', 'Import', and 'Add' are at the bottom right.

Code	Description
1212	1212
8472	1212

Custom Attributes

Quickly view detailed information behind any cost activity with the details flyout panel. With the Custom Attribute feature teams can customize a portion of the details flyout panel to suit their needs and preferences.



1 Accessing the Custom Attributes

- In the Project Admin module, select the “Services” tab.
- On the left sidebar select “Cost Management” then “Custom Attributes.” Note, only project admins can create custom attributes.
- Custom attributes can be created for the following components:
 - Budget
 - Contract
 - Cost Item
 - PCO (Potential Change Order)
 - RFQ (Request for Quotation)
 - RCO (Request for Change Order)
 - OCO (Owner Change Order)
 - SCO (Supplier Change Order)
- Note, the component names can be customized within General Settings.

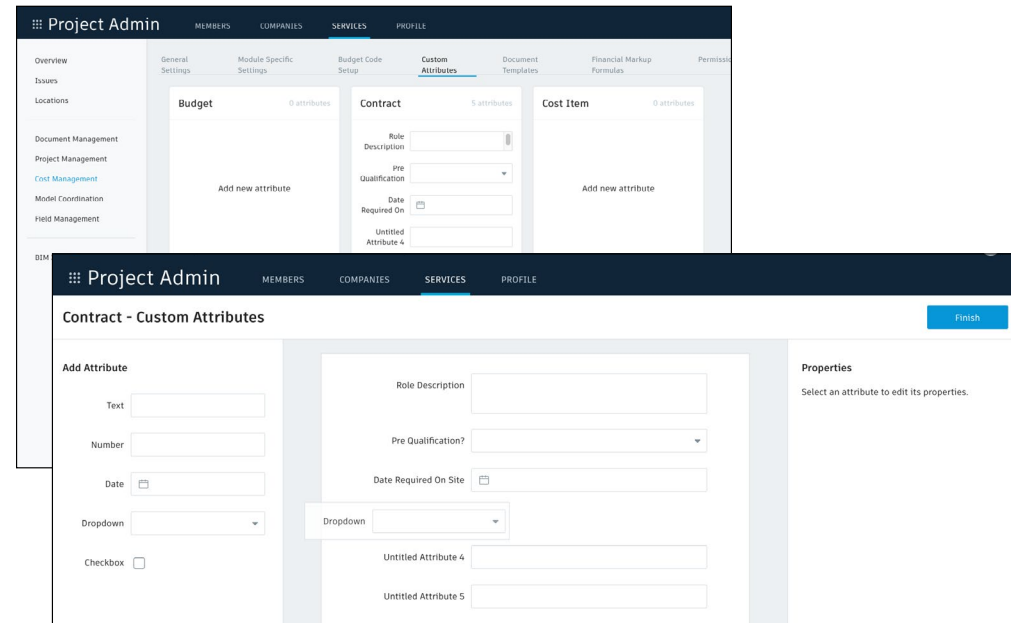
A screenshot of the 'Project Admin' web application. The top navigation bar includes 'MEMBERS', 'COMPANIES', 'SERVICES', and 'PROFILE'. The 'SERVICES' tab is active. On the left sidebar, 'Cost Management' is selected, and 'Custom Attributes' is highlighted. The main content area is divided into a grid of six panels: 'Budget' (0 attributes), 'Contract' (5 attributes), 'Cost Item' (0 attributes), 'PCO' (0 attributes), 'RFQ' (0 attributes), and 'RCO' (0 attributes). Each panel has an 'Add new attribute' button. The 'Contract' panel is expanded, showing fields for 'Role Description', 'Pre Qualification', 'Date Required On', and 'Untitled Attribute 4'.

Terminology Reference 

Custom Attributes

2 Creating a Custom Attribute

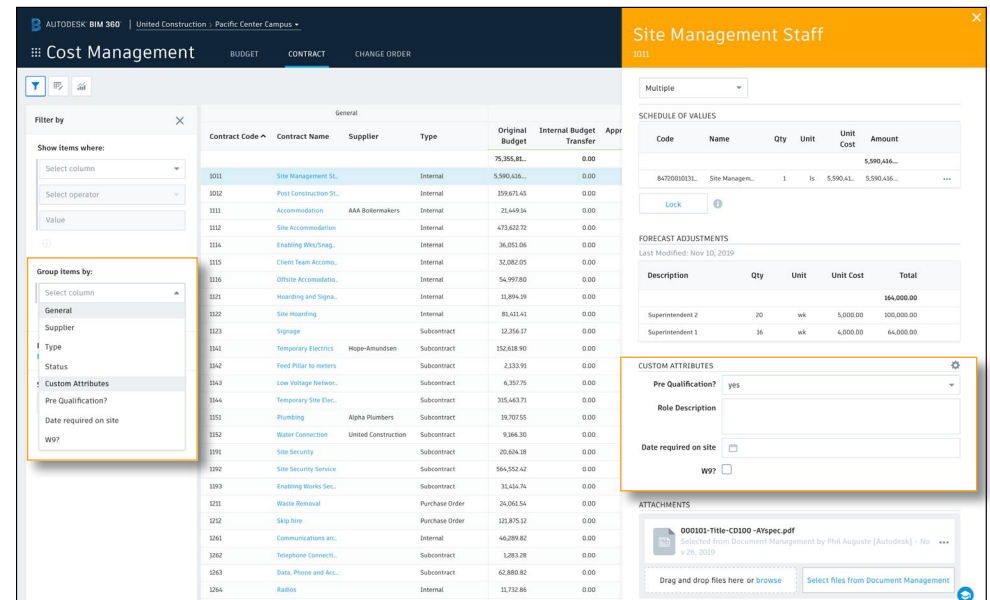
- To create a custom attribute, select the component.
- Either click to add or drag and drop the attribute from the left sidebar into the center preview panel.
- Then select the attribute and define the settings in the properties panel on the right
- Rearrange the attributes by clicking the six dots and dragging and dropping the field.
- Select “Finish” when done.



3 View Custom Attribute in the Details Flyout

- In the Cost Management module, select a cost activity line item. The details flyout will appear.
- In the details flyout select “Custom Attributes” from the top left drop-down list.
- This will display the custom attribute created in the Project Admin module.

PRO TIP: Add your custom attributes to the table view via the control icon. In the table view, you can assign them. You can also use custom attributes for grouping and filtering. To do this, select the filter icon and then choose the attribute from the Group Items By drop-down.

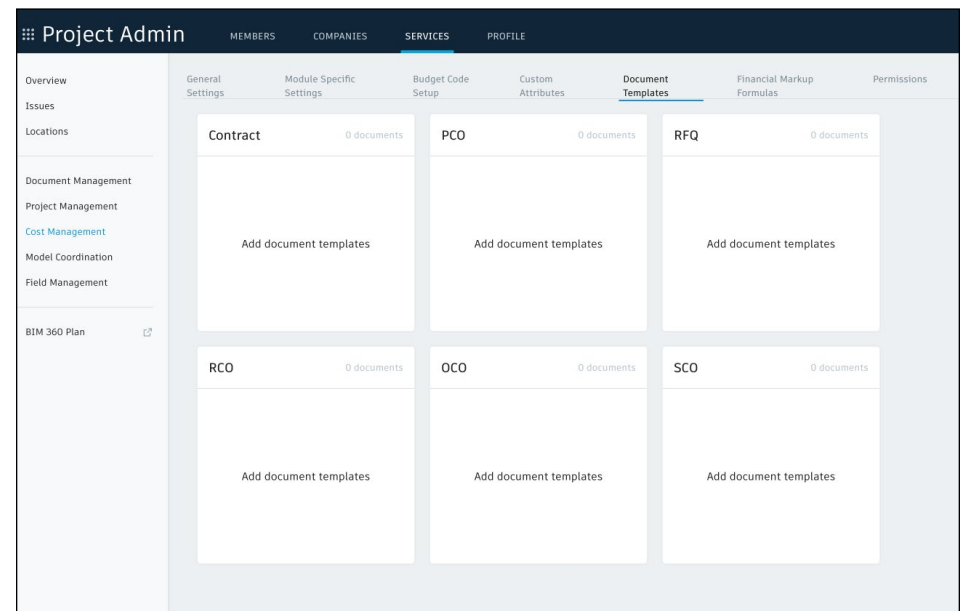


Document Templates

Easily create standard documentation formats for distribution during the change order, pricing request and approval processes with Cost Management's Document Templates capabilities. Templates are created using fields that are automatically populated directly from BIM 360 once a document is generated.

1 Accessing the Document Templates

- In the Project Admin module, select the “Services” tab.
- On the left sidebar select “Cost Management” then “Document Templates.” Note, only project admins can manage the document templates.
- The document templates will be utilized in the Cost Management module when generating documents such as a supplier contracts.
- The component names in Document Templates (PCO, RFQ, RCO, OCO, SCO) can be customized within General Settings.
- There is no limit to the number of document templates that can be associated with each component.

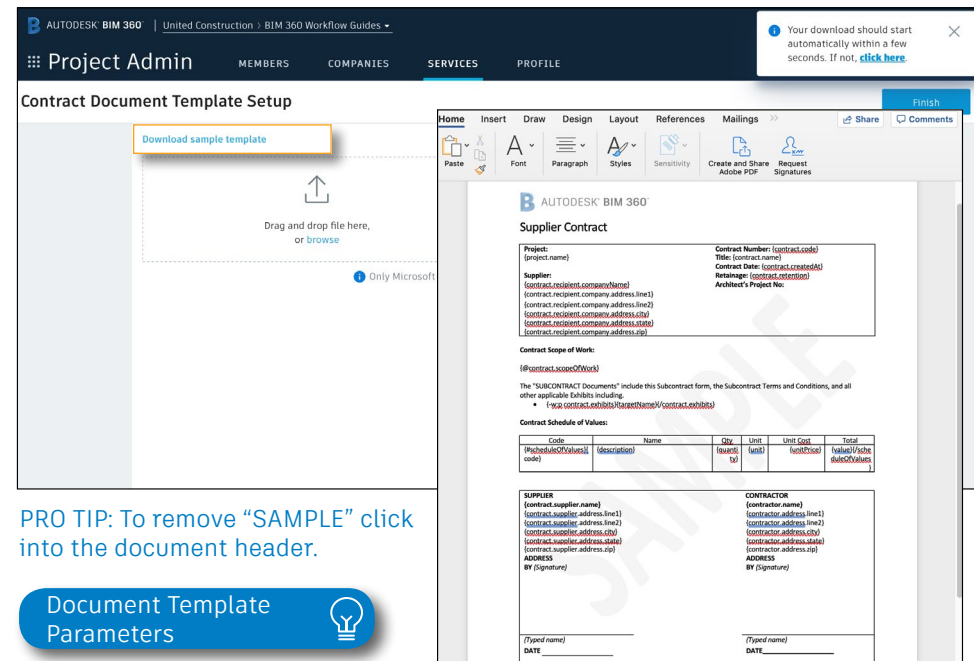


PRO TIP: Only Microsoft Word Documents are supported.

Document Templates

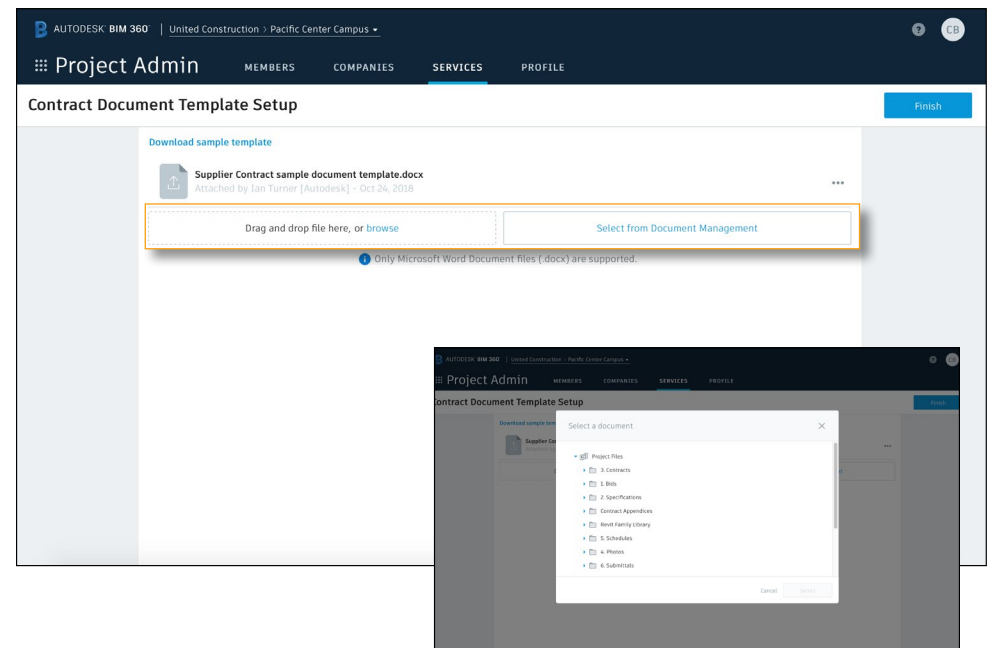
2 Downloading a Sample Template

- In Document Templates select the component you want to add a template to.
- Select “Download sample template” to download a Word template.
- The downloaded template can be customized to suit your needs. Note, the content within the brackets must stay the same for the module to recognize and to auto-populate it when generating the document.
- Once finalized, update the template name and save.



3 Uploading a Document Template

- There are two ways you can upload a document template:
 - **Option 1:** Drag and drop the file or click “browse” to locate the file to upload.
 - **Option 2:** Select a document from the BIM 360 Document Management module by clicking “Select from Document Management” and navigating to the correct folder.
- Select “Finish” to save and exit.



Module Specific Settings

In the Module Specific Settings tab teams have the option to configure the code format by customizing the prefix, suffix, number of digits and start number for each component.



1 Accessing the Module Specific Settings

- In the Project Admin module, select the “Services” tab.
- On the left sidebar select “Cost Management” then “Module Specific Settings.” Note, only project admins can edit the module specific settings.

2 Module Specific Settings

- In the Module Specific Settings tab you have the option to configure the code format by customizing the prefix, suffix, number of digits, and start number for each component.
- The component names (Cost Item, PCO, RFQ, RCO, OCO, SCO) can be customized within General Settings.
- This will dictate how the information is displayed in the number column of each tab within the Cost Management module.

Component	Prefix	Suffix	Number of Digits	Start Number
Cost Item	CI-		4	1
PCO	P-		4	1
RFQ	QR-		4	1
RCO	R-		4	1
OCO	O-		4	1
SCO	S-		4	1

PRO TIP: For RFQs & SCOs check the “Include Contract Code in Prefix” box to provide relative codes per contract.

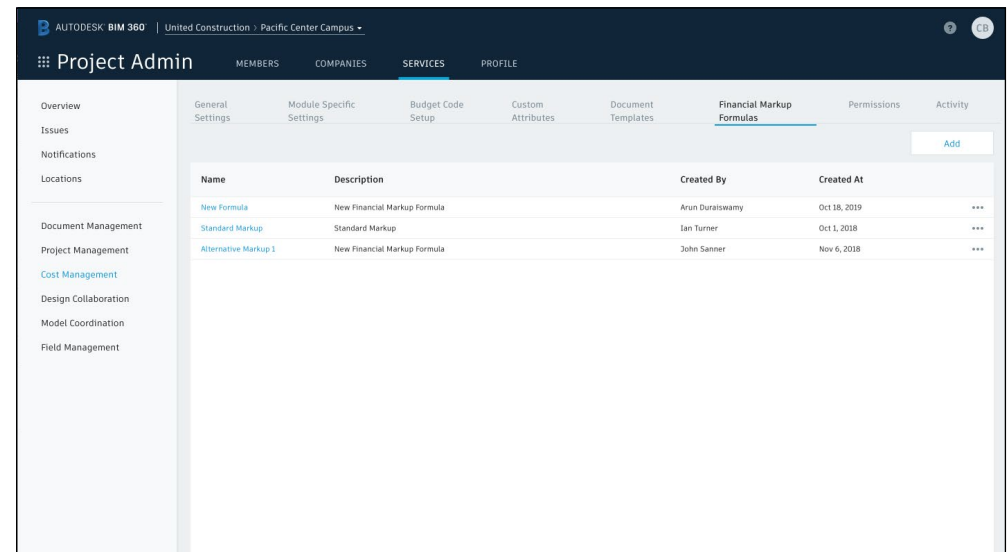
<input type="checkbox"/>	► QR-0030	Cladding Change
<input type="checkbox"/>	► QR-0032	Doors - Revised Main

Financial Markup Formulas

Easily create multiple project level markup configurations to apply to Potential Change Orders (PCOs), Requests for Change Orders (RCOs) or Owner Change Orders (OCOs).

1 Accessing Financial Markup

- In the “Project Admin” module, select the “Services” tab.
- On the left sidebar select “Cost Management” then “Financial Markup Formulas.” Note, only project admins can manage the markup formulas.
- Multiple markup formulas can be created and any existing formulas will be available in the list.
- The markups created here can then be applied to either PCOs, RCOs, or OCOs.



The screenshot displays the Autodesk BIM 360 Project Admin interface. The top navigation bar includes the Autodesk BIM 360 logo, the project name "United Construction - Pacific Center Campus", and user information. The main navigation tabs are MEMBERS, COMPANIES, SERVICES (selected), and PROFILE. The left sidebar lists various modules: Overview, Issues, Notifications, Locations, Document Management, Project Management, Cost Management (selected), Design Collaboration, Model Coordination, and Field Management. Under Cost Management, the "Financial Markup Formulas" option is selected. The main content area shows a table with three columns: Name, Description, and Created By. The table lists three formulas: "New Formula", "Standard Markup", and "Alternative Markup 1". Each row includes a "Created At" date and a "Created By" name. An "Add" button is visible in the top right corner of the table area.

Name	Description	Created By	Created At
New Formula	New Financial Markup Formula	Arun Duraiswamy	Oct 18, 2019
Standard Markup	Standard Markup	Ian Turner	Oct 1, 2018
Alternative Markup 1	New Financial Markup Formula	John Sanner	Nov 6, 2018

Financial Markup Formulas

2 Creating a Markup Formula

- In the “Financial Markup Formulas” tab select “Add.”
 - Select the top “New Formula” field to title the formula.
 - To add a description select the pencil icon next to “New Formula Markup Formula.”
 - To enter a sample cost basis, which will allow you to check the calculation as you start building the formula, select the pencil icon next to “Sample cost basis.”
- **Creating the formula:**
 1. Click “Markup” to add a new markup row to the formula or select “Markup” and drag it into the center preview panel.
 2. In the Markup edit panel name the markup (e.g. Fee).
 3. Select the markup type & amount:
 - “Percentage” for a standard percentage based markup.
 - “Flat” for a flat fee, per PCO.
 4. Select the “Cost Basis” from the drop-down.
 5. (Optional) add a description of the markup.
 6. Search or scroll to select a target budget item for the markup.
 7. By default, markups are calculated on all budget items. Using the “Calculate on” fields you can enter rules to only calculate on particular budget codes, cost types etc.

Autodesk BIM 360 | United Construction > Pacific Center Campus

Project Admin MEMBERS COMPANIES SERVICES PROFILE

New Formula

New Financial Markup Formula Sample cost basis 1,000.00

Drag and drop to add formula item

Name	Amount	Cost Basis	Result
Markup	0.00		
Subtotal	0.00		
Grand total			1,000.00

Markup total 0.00

Please note

Autodesk BIM 360 | United Construction > Pacific Center Campus

Project Admin MEMBERS COMPANIES SERVICES PROFILE

Alternative Markup 1

New Financial Markup Formula Sample cost basis 10,000.00

Drag and drop to add formula item

Name	Amount	Cost Basis	Result
Insurance	2.00%	10,000.00	200.00
Insurance			200.00
Contingency	3.00%	10,200.00	306.00
Fee	4.00%	10,506.00	437.75
Contingency & Fee			743.75
Markup total			943.75
Grand total			10,943.75

Markup edit

Name Fee

Type & amount Percentage

Cost Basis Grand total

Description Fee

Map markup to budget code 84720010120101FEE

Calculate on

Select column

Select operator

Value

Financial Markup Formulas

8. Add a subtotal by selecting “Subtotal” or dragging it into the center preview panel.

- Name the subtotal (e.g. Contingency & Fee).
- Select the appropriate “Cost Basis Revising” option.
 - “Revise Cost Basis” (default) if revising the cost basis for all subsequent markups will be included.
 - “Info Only” to summarize any markups above for information

- Select “Save.”

The screenshot shows the 'Alternative Markup 1' configuration screen in the Autodesk BIM 360 Project Admin interface. The interface is divided into several sections:

- Left Panel:** A 'Drag and drop to add formula item' section with a list of items: 'Markup' (0.00) and 'Subtotal' (0.00). The 'Subtotal' item is highlighted with an orange circle.
- Center Panel:** A table showing the markup calculation. The table has columns for 'Name', 'Amount', 'Cost Basis', and 'Result'. The items listed are 'Insurance' (2.00%, 10,000.00, 200.00), 'Contingency' (3.00%, 10,200.00, 306.00), 'Fee' (4.00%, 10,506.25, 437.75), and 'Contingency & Fee' (763.75). Below the table, there is a 'Markup total' of 943.75 and a 'Grand total' of 10,943.75.
- Right Panel:** A 'Subtotal edit' panel with a 'Name' field set to 'Contingency & Fee'. Below this, there are two radio button options for 'Cost basis revising': 'Revise cost basis' (selected) and 'Info only'.

The 'Revise cost basis' option is selected, indicating that the cost basis will be revised for all subsequent markups.

PRO TIP: Drag and drop markups and subtotals to rearrange if required.

General Settings & Permissions

It is essential to assign permission levels appropriately to ensure the right people have access to the right information. With the ability to set standardized permission controls, sharing information has never been easier. Once you finish setting up your original budget you can lock it to avoid accidental changes.

1 Accessing General Settings

- In the “Project Admin” module, select the “Services” tab.
- On the left sidebar select “Cost Management” then “General Settings.” Note, only project admins can edit the general setting.

2 Editing the General Settings

1. **Unit of Measure** - select imperial or metric.
2. **Unit of Measure List** - set specific dimension as default or deactivate certain units from the list.
3. **RFQ (Request for Quotation) Response Due** - set the default response time frame for RFQs.
4. **Companies Setup** - identify the project Owner, General Contractor and Architect.

Project Admin | MEMBERS | COMPANIES | SERVICES | PROFILE

Overview | Issues | Notifications | Locations | Document Management | Project Management | **Cost Management** | Design Collaboration | Model Coordination | Field Management | BIM 360 Plan

General Settings | Module Specific Settings | Budget Code Setup | Custom Attributes | Document Templates | Financial Markup Formulas | Permissions | Activity

Unit of Measure 1
Metric

Display Name	Description	Dimension	Status
ft	Footline	Volume / Capacity	Active
cm	Centimetre	Length	Active
cm2	Square Centimetre	Area	Active
cm3	Cubic Centimetre	Volume / Capacity	Active
ft	Set as default	Count / General	Active
ft	Deactivate	Volume / Capacity	Active
dm	Decimetre	Length	Active
dm2	Square Decimetre	Area	Active
dm3	Cubic Decimetre	Volume / Capacity	Active

RFQ Response Due In 14 Days (1 - 999) 3

Companies Setup 4

Owner: Martha's Landscaping | Contact: Select...

General Contractor: United Construction | Contact: Select...

Architect: BNIM | Contact: Select...

Notary: Select... | Contact: Select...

Rounding Settings

Rule	Accuracy	Example

General Settings & Permissions

5. **Round Settings** - select the “Rule” (Half Up, Round Up, Round Down) and “Accuracy” (1, 0.1, 0.01, 0.05). In the example field you can test the settings.
6. **Budget & Cost Payment Application Retention:** allows you to put in a specific retention % for completed work and materials on site.
7. **Lock Budget** - once the original budget setup is finalized, you may lock it to avoid accidental change.
8. **Custom Tab Names** - allows you to change the default sub-tab names (Cost Item, PCO, RFQ, RCO, OCO, & SCO) that appear in the Change Order tab to better suit your needs.
9. **Contract Types** - use the “Add” button to create a list of contract types. In edit mode in the Contracts tab in the Cost Management module, you can assign a contract type to a line item via a drop-down.
10. **Cost Item Types** - use the “Add” button to create a list of cost item types. In the Cost Item tab within Change Orders in the Cost Management module, you can assign a cost item type to a line item via a drop-down list.
11. **PCO Types** - use the “Add” button to create a list of PCO types. In the PCO tab within Change Orders in the Cost Management module, you can assign a PCO type to a line item via a drop-down list.
12. **PCO Source Types** - use the “Add” button to create a list of PCO source types. In the PCO tab within Change Orders in the Cost Management module, you can assign a PCO source type to a line item via a drop-down list.

Project Admin | MEMBERS | COMPANIES | SERVICES | PROFILE

Overview | Issues | Notifications | Locations | Document Management | Project Management | Cost Management | Design Collaboration | Model Coordination | Field Management | BIM 360 Plan

General Settings | Module Specific Settings | Budget Code Setup | Custom Attributes | Document Templates | Financial Markup Formulas | Permissions | Activity

Round Settings 5
Rule: Round up | Accuracy: 0.01 | Example: 12345 → 124

Budget Payment Application Retention 6
Completed Work: % | Materials on Site: %

Cost Payment Application Retention
Completed Work: % | Materials on Site: %

Lock Budget 7
Lock your original budget to avoid accidental change.
Only project administrators can edit original budgets after it is locked.
[Lock Budget](#)

Custom tab names
Original ^ | Customized
Cost Item: The individual, detailed items within a change order.
OCO: Owner Change Orders, upstream budget change orders which amend the prime/main contract.
PCO: Potential Change Orders, the starting point of any budget or cost change, and used to generate an RFQ, RCO, OCO, or SCO. 8
RCO: Request for quotation change order.
RFQ: Request for Quotation
SCO: Supplier Change Order, downstream cost change order which amend the original supplier contracts.

Contract types
[Add](#)

Project Admin | MEMBERS | COMPANIES | SERVICES | PROFILE

Overview | Issues | Notifications | Locations | Document Management | Project Management | Cost Management | Design Collaboration | Model Coordination | Field Management | BIM 360 Plan

General Settings | Module Specific Settings | Budget Code Setup | Custom Attributes | Document Templates | Financial Markup Formulas | Permissions | Activity

Contract types 9
[Add](#)

Type ^	Description	Status
Consultant	---	Active
Internal	---	Active
Purchase Order	---	Active
Subcontract	---	Active

Cost Item types 10
[Add](#)

Type ^	Description	Status
Back Charge	---	Active
Budget Transfer	---	Active
Contingency	---	Active
Internal Change	---	Active
Owner Change Order	---	Active
Owner Directive	---	Active

PCO types 11
[Deactivate](#) [Add](#)

Type ^	Description	Status
Back Charge	---	Active
Budget Transfer	---	Active
Contingency	---	Active
Internal Change	---	Active
Owner Change Order	---	Active
Owner Directive	---	Active

PCO Source types 12
[Add](#)

Type ^	Description	Status
ASI	Architect's Supplemental Instructions	Active
CCO	Construction Change Directives	Active
INT	Internal	Active
ISSUE	Issue	Active

General Settings & Permissions

3 Setting Permissions

- Select the “Permissions” tab.
- Here you can designate user-, role-, or company-based permissions.
- Use the search field to find a user, company or role and click “Add.”
- Permission levels are “view all” or “full control (editing).” Permission levels can be different for each tab.
- To set permissions select the permission level under each column to access the menu drop-down.

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User

Steve Subs

Substructures R Us

Uhl Uhl

Utilizeus

Role

Architect

BIM Manager

Civil Engineer

Main Contract	Budget Payment Application	Contract	Cost Payment Application	Cost Item, Change Order & RFQ
Full Control	Full Control	Full Control	Full Control	Full Control
Full Control	Full Control	Full Control	Full Control	Full Control
Full Control	Full Control	Full Control	Full Control	Full Control

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Enter user, role or company

Add

Name	Type	Budget	Main Contract	Budget Payment Application	Contract	Cost Payment Application	Cost Item, Change Order & RFQ
Cassie Bustos (Ad...	User	Full Control	Full Control	Full Control	Full Control	Full Control	Full Control
Ian Turner (Admin)	User	Full Control	Full Control	Full Control	Full Control	Full Control	Full Control
John Sanner (Admi...	User	Full Control	Full Control	Full Control	Full Control	Full Control	Full Control
Archie Architect	User	View All	<div><div>View All</div><div>View All</div><div>Full Control</div></div>	View All	View All	View All	View All

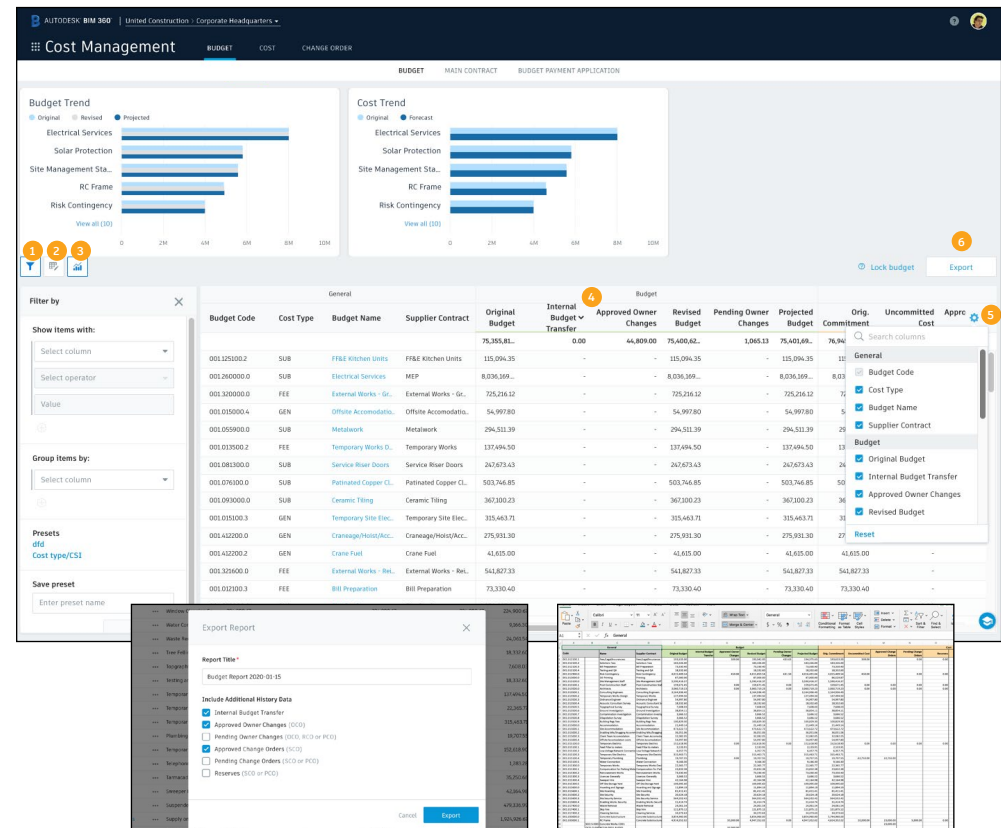
Module Overview

Cost Management provides a real-time summary view of all budget items and contracts, giving a clear picture of revenue, costs, forecast and variance related to each item. This enables teams to minimize risk by managing all cost-related construction activities in a single software.

1 Budget Tab Overview Mode

Open the Cost Management module and select the “Budget” tab.

1. You can select the filter icon to open a flyout panel where you can create and save filters with multiple conditions.
2. The edit icon allows you to toggle between the overview and edit modes.
3. The chart icon allows you to turn charts on or off.
4. You can select the column headers to sort in ascending or descending order.
5. Column settings allows you to select the columns you wish to include in your view.
6. Export button allows you to export a nicely formatted budget report. It also provides the option to include additional historical data.



Module Overview

2 Budget Tab Edit Mode

In the Budget tab select the edit icon to enable the edit mode.

1. "Import" allows you to import an Excel file. It works the same as budget template creation.
2. "Add" allows you to manually enter new budget items.
3. Click within the Unit column to access a drop-down list of available units, assign the appropriate unit.

With a single budget item selected:

4. "Delete" allows you to delete the line item.
5. "Budget Transfer" allows you to do an internal transfer.
6. "Add Sub-Item" populates a new sub-item to fill in underneath the budget item.
 - There are no restriction on hierarchy levels, and the totals from all child items are rolled up to the parent and divided by the parent qty to provide a unit cost allowing visibility into how the budget number was derived.
7. Select the three dots to open a menu which also allows you to easily add a sub-item, do a budget transfer, or delete. But it also provides the option to make actual cost adjustments.

Budget Code	Cost Type	Budget Name	Qty	Unit	Unit Cost	Amount	Internal Budget Transfer	Actual Cost	Actual Cost Adjustments	Supplier Contract	Supplier
001.255700.2	GEN	Data, Phone and Access Control	1	In	62,880.82	62,880.82	75,355,816.40	0.00	0.00	-	Data, Phone and Access Control
001.422000.1	GEN	Cranes	1	In	795,660.51	795,660.51	-	-	-	-	Tower Cranes
001.422000.2	GEN	Crane Fuel	1	In	41,615.00	41,615.00	-	-	-	-	Crane Fuel
001.422000.0	GEN	Cranage/Hoists/Access	1	In	275,931.30	275,931.30	-	-	-	-	Cranage/Hoists/Access
001.0131000.7	FEE	Contamination Investigation	1	In	3,666.52	3,666.52	-	-	-	-	Contamination Investigation
001.0131000.1	FEE	Consulting Engineers	1	In	3,164,936.40	3,164,936.40	-	-	-	-	Consulting Engineers
001.0131000.0	SUB	Concrete Substructure	1	In	3,854,960.00	3,854,960.00	-	-	-	-	Concrete Substructure & Frame
A0200.2		Special Foundation Walls	1,000	ct	536.00	536,000.00	-	-	-	-	
A0300.1		Slab on Grade	85,000	Centimetre	6.10	518,500.00	-	-	-	-	
A0400.1		Pits	1,000	cm	512.00	512,000.00	-	-	-	-	
A0500.1		Pile Caps	7,000	Centimetre	209.78	1,468,460.00	-	-	-	-	
03 20 01.1		Rebar to Pile Caps	700	cm2	2,000.00	1,400,000.00	-	-	-	-	
03 11 01.1		Formwork to Pile Caps	7,000	Square Centimetre	9.78	68,460.00	-	-	-	-	
A0201.1		Grade Beams	4,000	cm3	205.00	820,000.00	-	-	-	-	
001.0153000.1	GEN	Compensation for Parking Meters	1	Cubic Centimetre	23,832.38	23,832.38	-	-	-	-	Compensation for Parking Meters
001.255700.0	GEN	Communications and IT	1	d	46,289.82	46,289.82	-	-	-	-	Communications and IT
001.0153000.3	GEN	Client Team Accommodation	1	Day	32,082.05	32,082.05	-	-	-	-	Client Team Accommodation
001.017400.2	GEN	Cleaning Services	1	In	34,373.63	34,373.63	-	-	-	-	Cleaning Services
001.0193000.0	SUB	Ceramic Tiling	1	In	367,100.23	367,100.23	-	-	-	-	Ceramic Tiling

Budget Code	Cost Type	Budget Name	Qty	Unit	Unit Cost	Amount	Internal Budget Transfer	Actual Cost	Actual Cost Adjustments	Supplier Contract	Supplier
001.255700.2	GEN	Data, Phone and Access Control	1	In	62,880.82	62,880.82	75,355,816.40	0.00	0.00	-	Data, Phone and Access Control
001.422000.1	GEN	Cranes	1	In	795,660.51	795,660.51	-	-	-	-	Tower Cranes
001.422000.2	GEN	Crane Fuel	1	In	41,615.00	41,615.00	-	-	-	-	Crane Fuel
001.422000.0	GEN	Cranage/Hoists/Access	1	In	275,931.30	275,931.30	-	-	-	-	Cranage/Hoists/Access
001.0131000.7	FEE	Contamination Investigation	1	In	3,666.52	3,666.52	-	-	-	-	Contamination Investigation
001.0131000.1	FEE	Consulting Engineers	1	In	3,164,936.40	3,164,936.40	-	-	-	-	Consulting Engineers
001.0131000.0	SUB	Concrete Substructure	1	In	3,854,960.00	3,854,960.00	-	-	-	-	Concrete Substructure & Frame
A0200.2		Special Foundation Walls	1,000	cy	536.00	536,000.00	-	-	-	-	
A0300.1		Slab on Grade	85,000	sf	6.10	518,500.00	-	-	-	-	
A0400.1		Pits	1,000	cy	512.00	512,000.00	-	-	-	-	
A0500.1		Pile Caps	7,000	cy	209.78	1,468,460.00	-	-	-	-	
03 20 01.1		Rebar to Pile Caps	700	ty	2,000.00	1,400,000.00	-	-	-	-	
03 11 01.1		Formwork to Pile Caps	7,000	sf	9.78	68,460.00	-	-	-	-	
A0201.1		Grade Beams	4,000	cy	205.00	820,000.00	-	-	-	-	
001.0153000.1	GEN	Compensation for Parking Meters	1	In	23,832.38	23,832.38	-	-	-	-	Compensation for Parking Meters
001.255700.0	GEN	Communications and IT	1	In	46,289.82	46,289.82	-	-	-	-	Communications and IT
001.0153000.3	GEN	Client Team Accommodation	1	In	32,082.05	32,082.05	-	-	-	-	Client Team Accommodation
001.017400.2	GEN	Cleaning Services	1	In	34,373.63	34,373.63	-	-	-	-	Cleaning Services
001.0193000.0	SUB	Ceramic Tiling	1	In	367,100.23	367,100.23	-	-	-	-	Ceramic Tiling
001.012600.9	FEE	Building Bugs Test	1	In	100,829.30	100,829.30	-	-	-	-	Building Bugs Test

PRO TIP: If the user has view only permission they will have access to enter the edit mode. However, they will not have access to make edits.

Internal Budget Transfer

From: 001.0131000.0 - Concrete Substructure

To: 001.0131000.0 - Concrete Substructure

Transfer Amount: 3,854,960.00

Note:

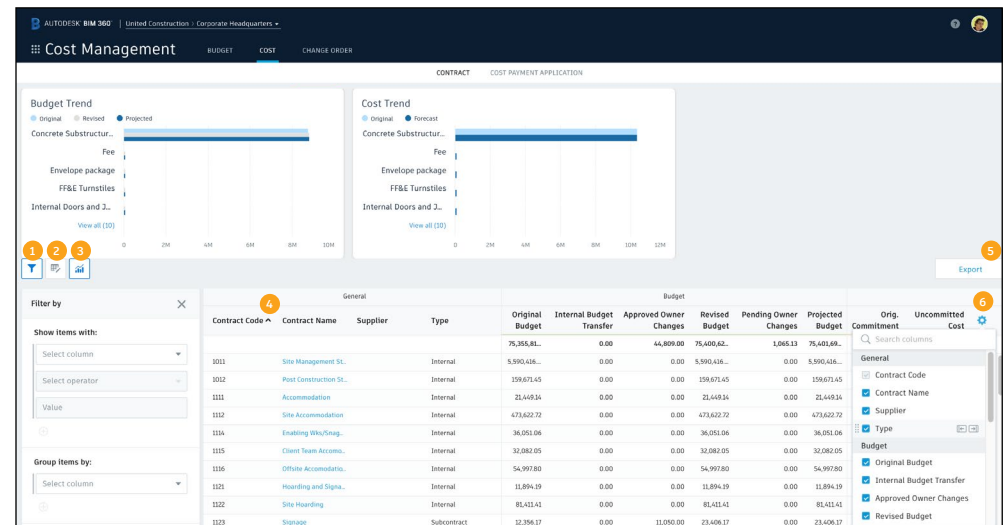
Cancel Save

Module Overview

3 Contract Tab Overview Mode

Open the Cost Management module and select the “Contract” tab. The contract overview works the same as the budget overview.

1. You can select the filter icon to open a flyout panel where you can create and save filters with multiple conditions.
2. The edit icon allows you to toggle between the overview and edit modes.
3. The chart icon allows you to turn charts on or off.
4. You can select the column headers to sort in ascending or descending order.
5. Export button allows you to export a contract report.
6. Column settings allows you to select the columns you wish to include in your view.



PRO TIP: Though some companies may have the same budget list as they do contracts, having both views is to facilitate having different lists even though the financial data adds up to the same total. This allows for contracts to be made of multiple budget codes and be able to be viewed either way.

Module Overview

4 Contract Tab Edit Mode

In the Contract tab select the edit icon to enable the edit mode. This works similarly to the budget edit mode.

1. “Import” allows you to import an Excel file.
2. “Add” allows you to manually enter a contract item.
3. “Export” allows you to export a contract report.
4. Click within the Type column to add a contract type to the line item.
5. Select the three dots to generate a document or delete a contract.
6. Select a contract name to open the details flyout panel.

The details flyout panel provides more information behind and can be edited. Use the drop-down to select the items to view in the flyout.

General:

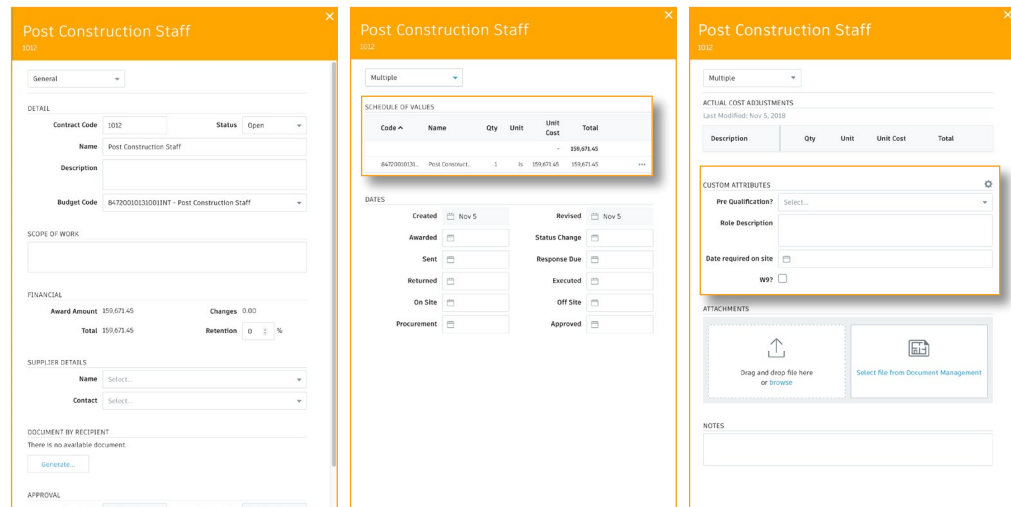
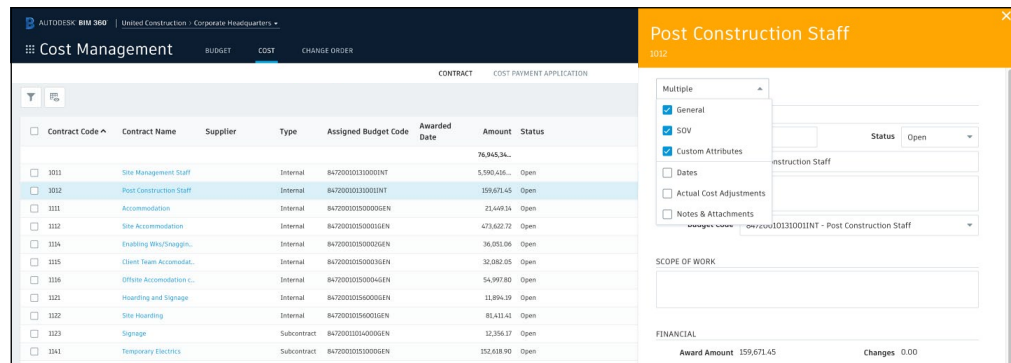
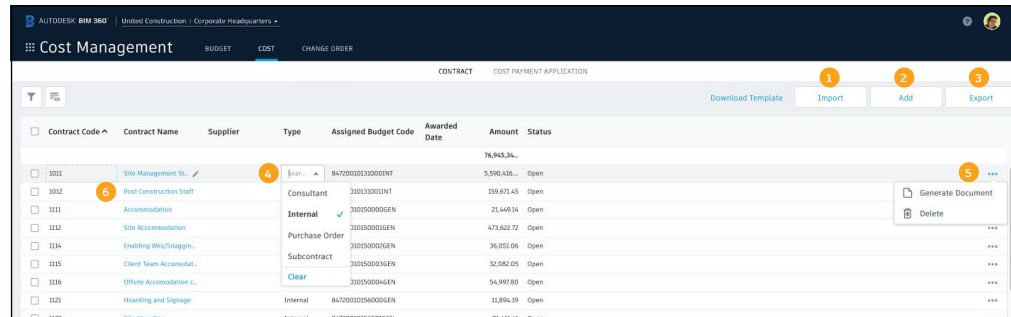
- “Budget Code” provides a list of all unallocated budget items. Create the connection between contract and budget item by assigning from this list.
- Add a supplier and select “Generate” to generate a contract.

SOV (Schedule of Values):

- By default the SOV will inherit any budget item build ups from the connected budget item. They can be removed by right clicking if you want to create a different list of items.
- They can also be appended or edited and the values overwritten to create the correct award value for the contract.

Custom Attributes:

- Allows you to customize a section of the. Steps for creating a custom attribute can be found in the custom attributes section of this guide.



PRO TIP: If the user has view only permission they will have access to enter the edit mode. However, they will not have access to make edits.

Module Overview

5 Fundamental Forecasting

New columns have been added to the Budget & Contracts tab as the first step to incorporating forecasting functionality into Cost Management. The columns include:

- Actual Costs
- Forecast Adjustments
- Forecast to Complete
- Forecast Final Cost
- Forecast Variance

Making Forecast Adjustments

- In the line, you wish to adjust right-click within the Forecast Adjustments column or select the three dots next to the item name to access the Edit Forecast Adjustments window.
- Select “add line item” and fill in the necessary information; you can add multiple list items. To delete an item, select the three dots. Select the “x” to exit back to the tab view.
- The total adjustments will appear in the Forecast Adjustments and Forecast Variance column. The Forecast Cost to Complete and Forecast Final Cost will now reflect the change.

Cost Management | BUDGET | COST | CHANGE ORDER

Budget Code	Cost Type	Budget Name	Supplier Contract	Orig	Bud
001.097400.0	SUB	Sprung Timber flooring	*** Sprung Timber floor...	75,35	
001.012100.2	FEE	Solicitors Fees	*** Solicitors Fees	183,3	
001.122400.0	SUB	Solar Protection	*** Solar Protection	5,818	
001.096800.0	SUB	Soft Flooring	*** Soft Flooring	897,8	
001.017400.1	GEN	Skip hire	*** Skip hire	121,8	
001.015600.3	GEN	Site Security Service	*** Site Security Service	564,5	
001.015600.2	GEN	Site Security	*** Site Security	20,6	
001.013100.0	INT	Site Management Staff	*** Site Management St...	5,590	
001.015600.1	GEN	Site Hoarding		81,4	
001.311000.0	SUB	Site Clearance		169,9	
001.015000.1	GEN	Site Accommodation	*** Site Accommodation	473,6	
001.101400.0	GEN	Signage	*** Signage	12,3	

Edit Forecast Adjustments

Last Modified: Nov 10, 2019

Description	Qty	Unit	Unit Cost	Total
	1	nr	0.00	0.00
Superintendent 2	20	wk	5,000.00	100,000.00
Superintendent 1	16	wk	4,000.00	64,000.00

Cost Management | BUDGET | COST | CHANGE ORDER

Revised Budget	Pending Owner Changes	Projected Budget	Orig. Commitment	Uncommitted Change Orders	Approved Change Orders	Pending Change Orders	Reserves	Projected Cost	Actual Cost	Forecast Adjustments	Forecast to Complete	% Complete	Forecast Final Cost	Variance	Forecast Variance
75,356.37	57,827.49	75,424.40	76,945,346.47	(42,003.00)	42,782.00	5,000.00	92,228.00	77,043,356.47	0.00	164,000.00	77,207,356.47	0	77,207,356.47	(1,628,953.38)	(1,792,953.38)
183,326.00	-	183,326.00	183,326.00	-	-	-	-	183,326.00	-	-	183,326.00	0	183,326.00	0.00	0.00
5,818,756.24	-	5,818,756.24	5,818,756.24	-	-	-	-	5,818,756.24	-	-	5,818,756.24	0	5,818,756.24	0.00	0.00
897,829.92	-	897,829.92	897,829.92	-	-	-	-	897,829.92	-	-	897,829.92	0	897,829.92	0.00	0.00
121,875.12	-	121,875.12	121,875.12	-	-	-	-	121,875.12	-	-	121,875.12	0	121,875.12	0.00	0.00
564,552.42	-	564,552.42	564,552.42	-	-	-	-	564,552.42	-	-	564,552.42	0	564,552.42	0.00	0.00
20,624.18	-	20,624.18	20,624.18	-	-	-	-	20,624.18	-	-	20,624.18	0	20,624.18	0.00	0.00
5,590,416.37	-	5,590,416.37	5,590,416.37	-	-	-	-	5,590,416.37	-	-	5,590,416.37	0	5,590,416.37	0.00	0.00
81,431.66	-	81,431.66	81,431.66	-	-	-	-	81,431.66	-	-	81,431.66	0	81,431.66	0.00	0.00
169,954.20	-	169,954.20	169,954.20	-	-	-	-	169,954.20	-	-	169,954.20	0	169,954.20	0.00	0.00
473,622.72	-	473,622.72	473,622.72	-	-	-	-	473,622.72	-	-	473,622.72	0	473,622.72	0.00	0.00
12,356.17	11,050.00	23,406.17	12,356.17	(11,050.00)	11,050.00	-	-	23,406.17	-	-	23,406.17	0	23,406.17	0.00	0.00
247,673.43	-	247,673.43	247,673.43	-	-	-	-	247,673.43	-	-	247,673.43	0	247,673.43	0.00	0.00
83,431.66	-	83,431.66	83,431.66	-	-	-	-	83,431.66	-	-	83,431.66	0	83,431.66	0.00	0.00
549,978.00	-	549,978.00	549,978.00	-	-	-	-	549,978.00	-	-	549,978.00	0	549,978.00	0.00	0.00
49,498.02	-	49,498.02	49,498.02	-	-	-	-	49,498.02	-	-	49,498.02	0	49,498.02	0.00	0.00
4,015,859.54	156.84	4,016,016.38	4,015,409.54	400.00	0.00	0.00	0.00	4,015,409.54	-	-	4,015,409.54	0	4,015,409.54	606.84	606.84
73,330.40	-	73,330.40	73,330.40	-	-	-	-	73,330.40	-	-	73,330.40	0	73,330.40	0.00	0.00
4,648,352.02	36,000.00	4,684,352.02	4,648,352.02	(36,000.00)	9,000.00	5,000.00	20,000.00	4,648,352.02	-	-	4,648,352.02	0	4,648,352.02	282,000.00	282,000.00
1,080,355.02	-	1,080,355.02	1,080,355.02	-	-	-	-	1,080,355.02	-	-	1,080,355.02	0	1,080,355.02	0.00	0.00

PRO TIP: The forecast adjustments can also be viewed in the details flyout panel by selecting the top drop-down, then “Forecast Adjustments.”

FORECAST ADJUSTMENTS

Last Modified: Oct 16, 2019

Description	Qty	Unit	Unit Cost	Total
				250,000.00
Add Resource Item 1	20	wk	5,000.00	100,000.00
Add Resource Item 2	30	wk	5,000.00	150,000.00

Change Order Management

A typical construction project can have dozens of change orders. Improve change order tracking across the entire approval process and view details of cost item impacts as well as historical reference points with Cost Management's change order capabilities.

1 Cost Item Sub-Tab

Cost items are the individual detailed items for each budget code associated with a potential change. The typical workflow is to create a Potential Change Order (PCO) and add cost items to it. However, in the Cost Items tab within the Change Orders tab in the Cost Management Module, you can easily add cost items or edit existing cost items.

This works similarly to the contract module edit mode.

1. "Add" allows you to manually enter a cost item.
2. "Export" allows you to export a cost item report.
3. Column settings allows you to select the columns you wish to include in your view.
4. "Budget Status" is the current status of the cost item in the budget request workflow.
5. Click the link to open the 'container' for whichever part of the process the cost item is currently in.
6. Select the three dots to delete a cost item.
7. Select a cost item name to open the details flyout panel.

Number	Name	Supplier	Budget Code	Type	Scope	Estimated	Proposed	Submittal	Approved	Commitment	Budget Status	Cost Status	PCO	RFQ	RCO	DCO	SCO
C1-0008	Fee			Owner Directive	Out	663.07	-	663.07	663.07	-	Approved						
C1-0081	Contingency		8470001012	Owner Change	Out	306.00	0.00	0.00	0.00	0.00	Open						
C1-0082	Fee		8470001012	Owner Change	Out	437.76	0.00	0.00	0.00	0.00	Open						
C1-0083	Insurance		8470001012	Owner Change	Out	290.00	0.00	0.00	0.00	-	Open						
C1-0084	Design - Revised Main E...			Owner Change	Out	5,000.00	5,000.00	6,000.00	6,000.00	6,000.00	Approved	Pricing	P-0017	QR-0018	0-0001	0-0001	
C1-0085	Roofing - Revised Main E...			Owner Change	Out	5,000.00	5,000.00	10,000.00	10,000.00	10,000.00	Approved	Pricing	P-0017	QR-0017	0-0001	0-0001	
C1-0086	Contingency		8470001012	Owner Change	Out	300.00	-	480.00	480.00	-	Open						
C1-0087	Insurance		8470001012	Owner Change	Out	206.00	-	329.60	329.60	-	Open						
C1-0088	Roofing		8470001012	Owner Change	Out	103.00	-	164.80	164.80	-	Open						
C1-0089	Fee			Owner Change	Out	442.25	-	707.37	707.37	-	Open						
C1-0090	Contingency		8470001012	Owner Directive	Out	300.00	-	331.50	331.50	-	Submitted		P-0016	0-0001	0-0001	0-0001	
C1-0091	Insurance		8470001012	Owner Directive	Out	206.00	-	227.63	227.63	-	Submitted		P-0016	0-0001	0-0001	0-0001	
C1-0092	Roofing			Owner Directive	Out	103.00	-	113.82	113.82	-	Submitted		P-0016	0-0001	0-0001	0-0001	
C1-0093	Fee			Owner Directive	Out	442.25	-	488.46	488.46	-	Submitted		P-0016	0-0001	0-0001	0-0001	
C1-0094	Cladding Specification			Owner Directive	Out	800.000	-	1,000.00	1,000.00	-	Approved	Proposed	P-0015	QR-0015	0-0001	0-0001	
C1-0095	AS2 R13 Revised Kitch...		8470001012	Owner Change	Out	5,338.00	-	-	-	-	Draft	Draft	P-0013				

Change Order Management

Cost Item (Continued)

- In the details flyout panel use the drop-down to select the sections to view. Sections can be viewed individually or in a scrolling list. Creating and editing cost items will be done in the details flyout panel.
- Under “Cost Summary” you can break down the cost item into a more granular level of detail by selecting “define cost item hierarchy/breakdown.”
- Existing or new cost items created directly in the cost item view can be “assigned” to a PCO by selecting the check box next to the cost item.
- Once selected an “assign” button appears. Click the drop down to assign.
- An assign window will pop up where you can type in search criteria to filter the list. Select the PCO to add the cost item.

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Cost Management

BUDGET COST **COST ORDER**

						COST ITEM	PCD	RQI	RCD	OCO	SCD	
Y												
Number	Name	Supplier	Budget Code	Type	Scope	Estimated	Proposed	Submitted	Approved	Commitment	Budget Status	Cost
CI-0037	Frame - Additional Floor...	Substructures r...	8470000033L	Owner Change	Out	899,527.75	1,079,273.1	1,081,345.1	1,056,345.1	71,782.00	- Approved	+ Ap
CI-0038	Revised Slingshot		8470000033L	Owner Directive	Out	20,000.00	23,000.00	23,000.00	23,000.00	23,000.00	- Approved	+ Pr
CI-0065	Contingency		8470000032L	Owner Change	Out	450.00	-	450.00	450.00	-	- Open	
CI-0066	Insurance		8470000032L	Owner Directive	Out	309.00	-	309.00	309.00	-	- Open	
CI-0067	Bond		8470000032L	Owner Directive	Out	154.50	-	154.50	154.50	-	- Open	
CI-0068	Fee		8470000032L	Owner Directive	Out	663.07	-	663.07	663.07	-	- Open	
CI-0081	Contingency		8470000032L	Owner Change	Out	306.00	0.00	0.00	0.00	0.00	- Open	
CI-0082	Fee		8470000032L	Owner Change	Out	437.75	0.00	0.00	0.00	0.00	- Open	
CI-0083	Insurance		8470000032L	Owner Change	Out	200.00	0.00	0.00	0.00	-	- Open	
CI-0084	Doors - Revised Main E...		8470000032L	Owner Change	Out	5,000.00	5,000.00	6,000.00	6,000.00	6,000.00	- Approved	+ Pr
CI-0085	Planning - Revised Main...	Substructures r...	8470000033L	Owner Change	Out	5,000.00	5,000.00	10,000.00	10,000.00	9,000.00	- Approved	+ Pr
CI-0138	Contingency		8470000032L	Owner Change	Out	300.00	-	480.00	480.00	-	- Open	
CI-0140	Insurance		8470000032L	Owner Change	Out	205.00	-	329.60	329.60	-	- Open	
CI-0141	Bond		8470000032L	Owner Change	Out	103.00	-	164.80	164.80	-	- Open	
CI-0142	Fee		8470000032L	Owner Change	Out	442.05	-	707.27	707.27	-	- Open	
CI-0143	Contingency		8470000032L	Owner Directive	Out	300.00	-	331.50	331.50	-	- Submitted	
CI-0144	Insurance		8470000032L	Owner Directive	Out	206.00	-	227.63	227.63	-	- Submitted	
								131.82			- Submitted	
								483.64			- Submitted	
								903.00			- Submitted	+ Pr
								-	Draft		- Dr	
								-	22,732.00		- Approved	+ Ap
								-	-		- Open	+ Op
								30.00	-		- Open	
								20.60	-		- Open	
								10.30	-		- Open	
								44.21	-		- Open	
								60.00	-		- Open	

Multiple

- ☒ General
- ☒ Location
- ☐ Dates
- ☐ Custom Attributes
- ☐ Notes & Attachments

Revised Main Entrance Layout per ASIO2

Budget Code Select...

Contract Select...

Supplier Select...

Budget Status Approved Cost Status Pricing 0.00

Type Owner Chang... Schedule Change 0 Days

RELATED CHANGE ORDERS

PCD	RQI	RCD	OCO	SCD
P-0057	QR-0028	R-0003	O-0003	S-0006

COST SUMMARY

Estimated	Proposed	Submitted	Approved	Committed
5,000.00	5,000.00	6,000.00	6,000.00	6,000.00

COST SUMMARY

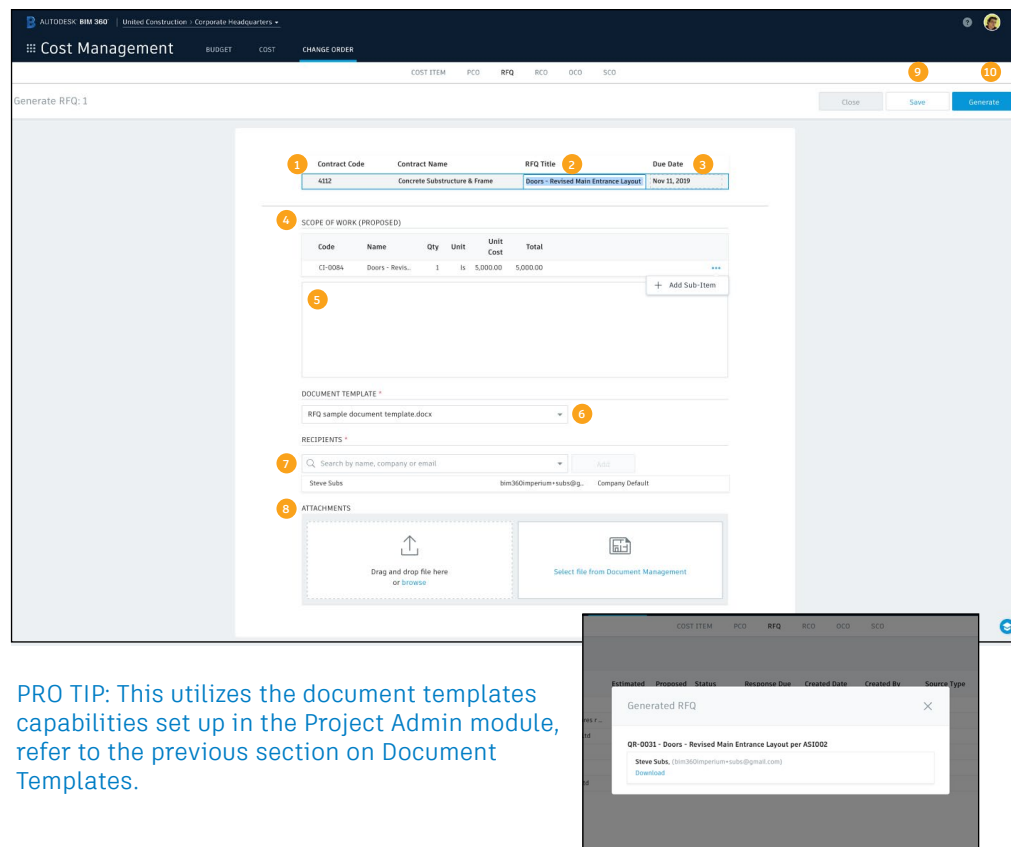
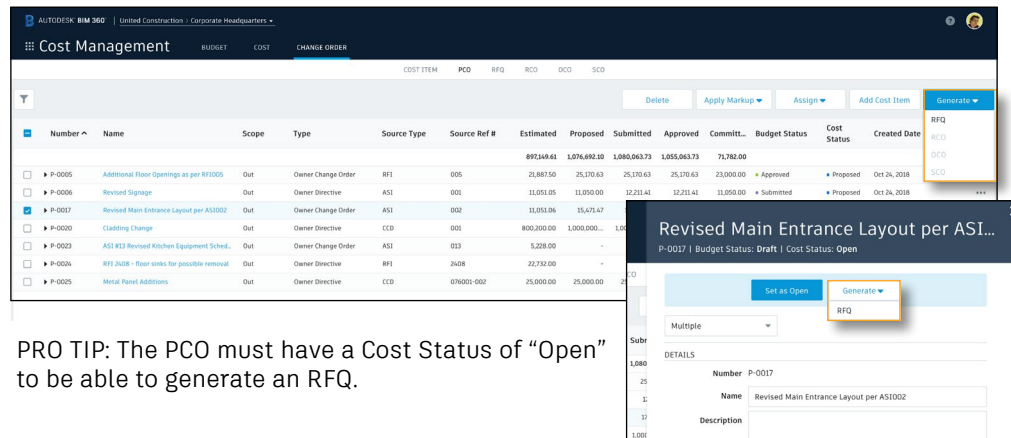
[illegible][illegible]

Change Order Management

3 Generating an RFQ from a PCO

RFQ (Request for Quotation) are the documents you generate to solicit pricing from a supplier. This process utilizes the document templates created in the Project Admin module.

- In the PCO tab, if you want to generate a single RFQ that includes all the associated cost items, select the checkbox next to the PCO or select the PCO name to open the details flyout panel. To generate individual RFQs for specific cost items in the PCO, select that line item.
- A “Generate” drop-down will appear, select RFQ. An RFQ generator window will open.
 1. Contract Code and Name are auto-populated by the related budget code.
 2. You can customize the RFQ title.
 3. Add a due date. By default due date requires a Project Admin permission level, but can be overwritten here.
 4. Edit unit cost or add a sub-item.
 5. Additional scope description will automatically be populated here from the PCO/Cost Item details flyouts, but can be edited/appended here.
 6. Select the desired document template.
 7. Search to add additional recipients. The default recipient is auto-populated based on the contract award of the same budget code the cost item is assigned.
 8. Additional files can be uploaded from your desktop or selected from the BIM 360 Document Management module.
 9. “Save” allows you to save the document in the current state and return to it later to complete.
 10. “Generate” allows you to create the document.

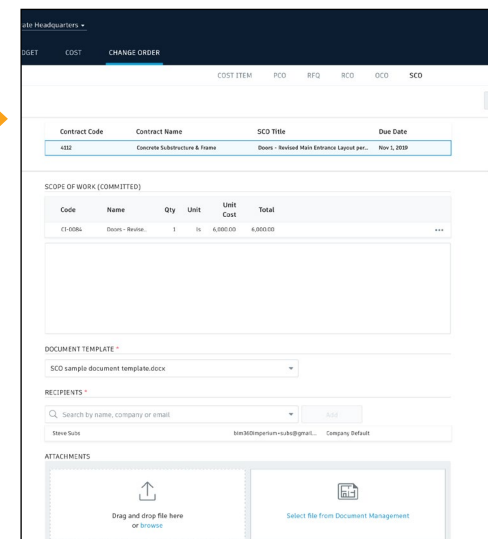
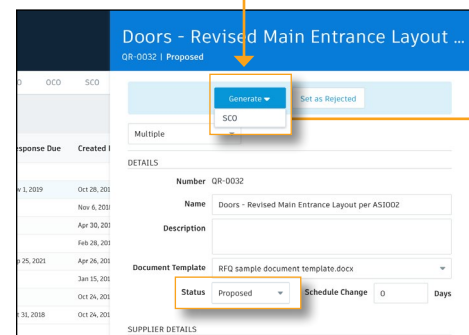
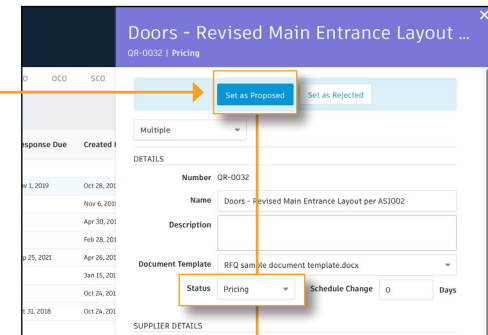
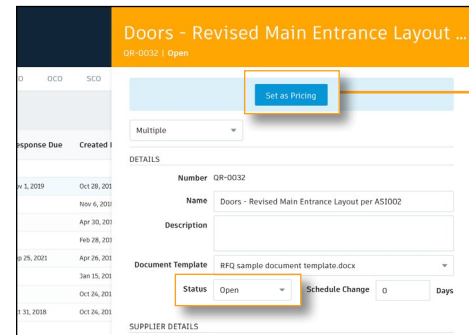
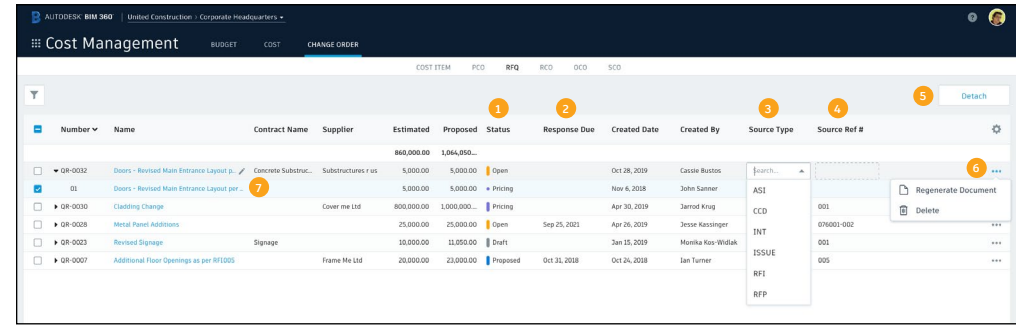


Change Order Management

4 RFQ Sub-Tab

The RFQ tab is within the Change Orders tab in the Cost Management Module.

1. "Status" auto updates to "Open" after a RFQ is generated from a PCO.
 2. "Response Due" will be populated when a date is added in the dates section of the details flyout panel.
 3. "Source Type" can be added by clicking to access the drop-down list.
 4. "Source Ref #" allows you to manually enter a number.
 5. "Detach" allows you to detach as cost item from an RFQ. It will still be part of the PCO.
 6. Select the three dots to regenerate the document or delete the RFQ.
 7. Select the name to open the details flyout panel.
- In the details flyout panel like the Contract module, use the drop-down list to select the sections to view. Sections can be viewed individually or in a scrolling list. Editing RFQ items can be done in this view.
 - Selectable workflow- based actions (buttons) will appear to help walk you through the process. For example, when the RFQ status is "Open," you will see a "Set as Pricing" button. By selecting it the status color changes and the next options you see are "Set as Proposed" or "Set as Rejected."
 - Select "SCO" to generate a Supplier Change Order. This process is similar to creating an RFQ. Fill in the information, select the document template, choose the recipient(s), attach files, and generate the document.



Change Order Management

5 Generating an RCO from a PCO

RCO (Request for Change Order) are upstream budget change orders. They are a means to request a change in the contract between the Owner and the Main Contractor. Typically, the RCO created by the Main Contractor is built from one or more cost items and sent to the Owner.

- In the PCO tab, if you want to generate a RCO select the check-box next to the PCO or select the PCO name to open the details flyout panel.
- A “Generate” drop-down will appear, select RCO. An RCO generator window will open.
- Like an RFQ, scope information is auto-populated. You can select the document template, choose the recipient(s), attached files, and generate the document.
- Multiple PCOs can be rolled up into a single RCO.
- Select the check-box next to multiple PCOs you would like to generate into a single RCO. When the “Generate” drop-down appears select RCO.
- The process is the same as generating a single document. However, the RCO will be a combination of the selected PCOs. The cost items will be combined and the scope is auto-populated but can be adjusted. Select the document template and recipient.

PRO TIP: The PCO must have a Budget Status of “Open” to be able to generate an RCO.

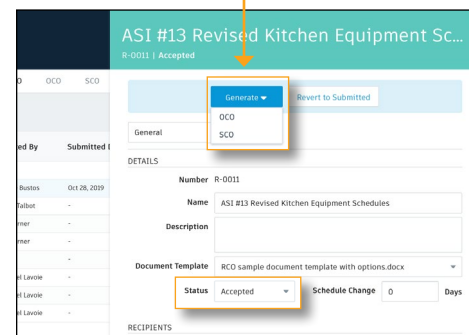
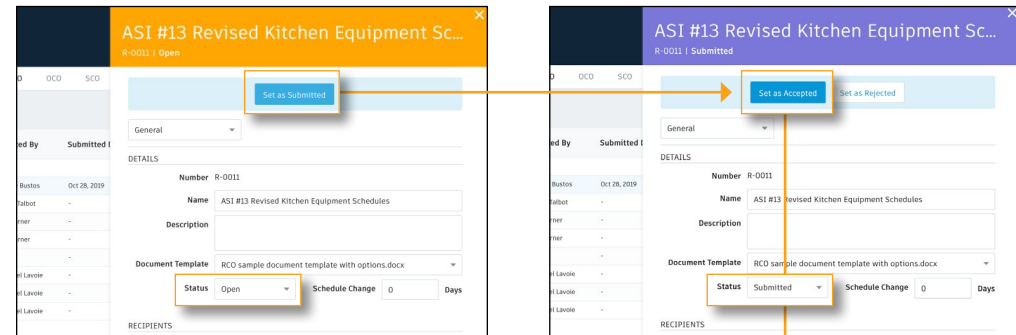
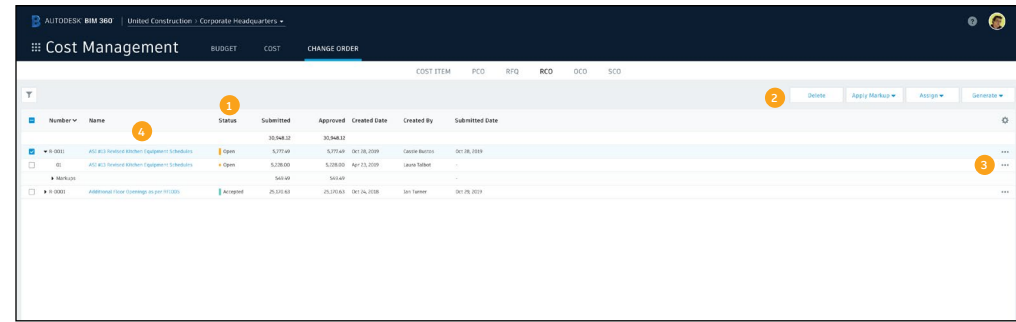
PRO TIP: If you don't need to generate an RCO bypass this step and go straight to an OCO.

Change Order Management

6 RCO Sub-Tab

The RCO tab is within the Change Orders tab in the Cost Management Module.

1. "Status" auto updates to "Open" after a RCO is generated from a PCO.
 2. Select the check-box next to the line item to access the delete, apply markup, assign, and generate buttons.
 3. Select the three dots to regenerate the document or delete the RCO.
 4. Select the name to open the details flyout panel.
- In the details flyout panel use the drop-down list to select the sections to view. Sections can be viewed individually or in a scrolling list. Editing RCO items can be done in this view.
 - Again, selectable workflow-based actions (buttons) will appear to help walk you through the process. For example, when the RCO status is "Open," you will see a "Set as Submitted" button. By selecting it the status color changes and the next options you see are "Set as Accepted" or "Set as Rejected."
 - Once the status is "Accepted" you will be able to generate a OCO or a SCO. Once you select the appropriate option this process is the same as generating an RFQ or RCO document.



Change Order Management

7 Generating an OCO from a RCO

OCO (Owner Change Order) represents a change order from the Owner to the Main Contractor/Construction Manager. These documents are built from one or many change requests (RCOs) by processing the RCOs into an OCO. The signed OCO legally amends a contract to affect a change in requirements, cost, or schedule to the previously negotiated contract.

- The RCO status must be “Accepted” to be able to generate an OCO.
- When you select “OCO” in the generate drop-down the process is the same as generating an RFQ or RCO document.
- Like an RCO, scope information is auto-populated. You can select the document template, choose the recipient(s), attached files and generate the document.
- Multiple RCOs can be rolled up into a single OCO.
- Select the check-box next to multiple RCOs you would like to generate into a single OCO. When the “Generate” drop down appears select OCO.
- The process is the same as generating a single document. However, the OCO will be a combination of the selected RCOs. The cost items will be combined and the scope is auto-populated but can be adjusted. Select the document template and recipient.

Autodesk BIM 360 | United Construction | Corporate Headquarters

Cost Management | BUDGET | COST | **CHANGE ORDER** | COST ITEM | RCO | RFQ | RCO | OCO | SCO

Generate (dropdown menu open showing OCO, RCO, SCO) | **Revert to Submitted**

General

Number: R-0011

Name: ASI #13 Revised Kitchen Equipment Schedules

Description: [Empty field]

Document Template: RCO sample document template with options.docx

Status: **Accepted** | Schedule Change: 0 | Days: [Empty field]

RECIPIENTS

R-0011 - ASI #13 Revised Kitchen Equipment Schedules

John Sanner, United Construction (john.sanner@autodesk.com)

[Download](#)

SCOPE OF WORK

Number	Name	Status	Submitted	Approved	Created Date	Created By	Submitted
R-0011	ASI #13 Revised Kitchen Equipment Schedules	Accepted	5,228.00	25,170.63	Oct 28, 2019	Cassie Bustos	Oct 28, 2019
01	ASI #13 Revised Kitchen Equipment Schedules	Accepted	5,228.00	25,170.63	Apr 23, 2019	Laura Talbot	-
R-0005	Additional Floor Openings as per RF0005	Submitted	25,170.63	25,170.63	Oct 24, 2018	Jan Turner	-
01	Frame - Additional Floor Openings as per RF0005	Approved	23,000.00	23,000.00	Oct 24, 2018	Jan Turner	-
Markups			2,170.63	2,170.63			
02	Insurance	Approved	460.00	460.00	Jul 29, 2019	Michael Lavie	-
03	Contingency	Approved	703.80	703.80	Jul 29, 2019	Michael Lavie	-
04	Fee	Approved	1,006.83	1,006.83	Jul 29, 2019	Michael Lavie	-

Autodesk BIM 360 | United Construction | Corporate Headquarters

Cost Management | BUDGET | COST | **CHANGE ORDER** | COST ITEM | RCO | RFQ | RCO | OCO | SCO

Generate OCO:1 | Close | Save | **Generate**

OCO TITLE

ASI #13 Revised Kitchen Equipment Schedules

SCOPE OF WORK (APPROVED)

Code	Name	Qty	Unit	Unit Cost	Total
C1-0130	ASI #13 Revised Kitchen Equipment Schedules	1	Is	5,228.00	5,228.00
C1-0135	Bond	1	Is	53.85	53.85
C1-0133	Contingency	1	Is	156.84	156.84
C1-0136	Fee	1	Is	231.10	231.10
C1-0134	Insurance	1	Is	107.70	107.70

OCO TITLE

ASI #13 Revised Kitchen Equipment Schedules

SCOPE OF WORK (APPROVED)

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OCO TITLE

ASI #13 Revised Kitchen Equipment Schedules

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OCO TITLE

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OCO TITLE

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SCOPE OF WORK (APPROVED)

Code	Name	Qty	Unit	Unit Cost	Total
C1-0130	ASI #13 Revised Kitchen Equipment Schedules	1	Is	5,228.00	5,228.00
C1-0135	Bond	1	Is	53.85	

Change Order Management

8 OCO Sub-Tab

The OCO tab is within the Change Orders tab in the Cost Management Module.

1. “Status” auto updates to “Open” after a OCO is generated from a RCO.
 2. Select the check-box next to the line item to access the delete, apply markup, and generate buttons.
 3. Select the three dots to regenerate the document or delete the OCO.
 4. Select the name to open the details flyout panel.
- In the details flyout panel use the drop-down list to select the sections to view. Sections can be viewed individually or in a scrolling list. Editing OCO items can be done in this view.
 - Again, selectable workflow-based actions (buttons) will appear to help walk you through the process. For example, when the OCO status is “Open,” you will see a “Set as Submitted” button. By selecting it the status color changes and the next options you see are “Set as Approved” or “Set as Rejected.”
 - Once the status is “Approved” you will be able to generate a SCO. You can either generate it now or select “Set as Executed” and then generate it. The SCO generation process is the same as generating a RFQ, RCO, and OCO.

Number	Name	Status	Submitted	Approved	Created Date	Created By	Submitted Date
0-0003	RCO R-0003, R-0003	Approved	80,063.73	55,063.73	Nov 26, 2018	Ian Turner	-
01	Frame - Additional Floor Openings as per...	Approved	23,000.00	23,000.00	Oct 24, 2018	Ian Turner	-
02	Revised Signage	Approved	11,050.00	11,050.00	Oct 24, 2018	Ian Turner	-
03	Stairs - Revised Main Entrance Layout per...	Approved	6,000.00	6,000.00	Nov 6, 2018	John Sanner	-
04	Flaming - Revised Main Entrance Layout per...	Approved	10,000.00	10,000.00	Nov 12, 2018	Ian Turner	-
0-0004	Metal Panel Additions	Open	25,000.00	5,013.73	May 7, 2019	Deb Miller	Oct 18, 2019

Metal Panel Additions
0-0009 | Open

Set as Submitted

Multiple

DETAILS

Number 0-0009

Name Metal Panel Additions

Description

Document Template OCO sample document template with options.docx

Status Open Schedule Change 0 Days

Metal Panel Additions
0-0009 | Submitted

Set as Approved Set as Rejected

Multiple

DETAILS

Number 0-0009

Name Metal Panel Additions

Description

Document Template OCO sample document template with options.docx

Status Submitted Schedule Change 0 Days

Metal Panel Additions
0-0009 | Approved

Set as Executed Generate

SCO

Revert to Submitted

Multiple

DETAILS

Number 0-0009

Name Metal Panel Additions

Description

Document Template OCO sample document template with options.docx

Status Approved Schedule Change 0 Days

Metal Panel Additions
0-0009 | Executed

Generate

SCO

Revert to Submitted

Multiple

DETAILS

Number 0-0009

Name Metal Panel Additions

Description

Document Template OCO sample document template with options.docx

Status Executed Schedule Change 0 Days

Change Order Management

9 Generating an SCO

SCO (Supplier Change Order) is a downstream cost change order which amend the original supplier contracts.

There are a few different ways you can generate an SCO:

- From a PCO with a budget status of “Open”, “Approved” or “Executed” and cost status of “Open” or “Proposed.”
- From an RFQ with a status of “Proposed.”
- From an RCO with the status of “Accepted.”
- From an OCO with the status of “Approved” or “Executed.”
- To generate a single SCO consisting of all cost items associated with a ‘parent’ line item, select the check-box next to the parent.
- To create individual SCOs for specific cost items within a “Parent,” select the box next to the cost item.
- You can also select multiple SCOs with multiple ‘parents’ to generate a single SCO from.
- The SCO generation process is the same as generating an RFQ, RCO, and OCO. When the document generator window opens information will be auto-populated. You can select the document template, choose the recipient(s), attach files and generate the document.

PRO TIP: If an SCO is being generated from an OCO made up of multiple RCOs the SCO will generate individual documents for each supplier affected by the change.

Change Order Management

10 SCO Sub-Tab

The SCO tab is within the Change Orders tab in the Cost Management Module.

1. "Status" auto updates to "Open" after a SCO is generated.
 2. Select the check-box next to the line item to access the delete button.
 3. Select the three dots to regenerate the document or delete the SCO.
 4. Select them name to open the details flyout panel.
- In the details flyout panel use the drop-down list to select the sections to view. Sections can be viewed individually or in a scrolling list. Editing SCO items can be done in this view.
 - Again, selectable workflow-based actions (buttons) will appear to help walk you through the process. For example, when the SCO status is "Open," you will see a "Set as Sent" button. By selecting it the status color changes and the next option you see is "Set as Executed."

Number	Name	Contract Name	Supplier	Awarded Date	Status	Proposed	Committed	Created Date	Created By
0-0007	Concrete Substructure & Frame	Concrete Substructure & Frame	Substructure Inc		Executed	12,000.00	12,000.00	Nov 26, 2018	Sam Turner
0-0007	Roofing - Recycled Metal & Timber Lined per #10000				Executed	1,000.00	1,000.00	Nov 22, 2018	Sam Turner
0-0007	Metal Panel Additions				Executed	1,000.00	1,000.00	Nov 22, 2018	Sam Turner
0-0007	Metal Panel Additions				Executed	25,000.00	25,000.00	Apr 26, 2019	Sam Turner
0-0007	Additional Floor Openings as per #10000				Executed	25,000.00	25,000.00	Apr 26, 2019	Sam Turner
0-0007	Roofing - Recycled Metal & Timber Lined per #10000				Executed	25,000.00	25,000.00	Apr 26, 2019	Sam Turner
0-0007	Roofing - Recycled Metal & Timber Lined per #10000				Executed	25,000.00	25,000.00	Apr 26, 2019	Sam Turner

Metal Panel Additions
S-0017 | Open

Set as Sent

Multiple

DETAILS

Number S-0017

Name Metal Panel Additions

Description

Document Template SCO sample document template.docx

Budget Code 847200105990005UB

Status Open

Schedule Change 0 Days

SUPPLIER DETAILS

Metal Panel Additions
S-0017 | Sent

Set as Executed

Multiple

DETAILS

Number S-0017

Name Metal Panel Additions

Description

Document Template SCO sample document template.docx

Budget Code 847200105990005UB

Status Sent

Schedule Change 0 Days

SUPPLIER DETAILS

Metal Panel Additions
S-0017 | Executed

Multiple

DETAILS

Number S-0017

Name Metal Panel Additions

Description

Document Template SCO sample document template.docx

Budget Code 847200105990005UB

Status Executed

Schedule Change 0 Days

SUPPLIER DETAILS

Pay Applications

Avoid risk and errors resulting from the use of disconnected cost management tools, and benefit from real-time visibility into how payments are affecting the project budget to maintain a view of the financial health of the project.

1 Creating main/prime contract(s)

Open the Cost Management module, select the Budget menu, then Main Contract tab. Note, if you have full control permission levels for this tab you can create a contract.

1. Select the edit icon.
2. In edit mode, an “Add” button will appear; select it to create a new main contract(s).
3. Type the contract code, name, and select the type drop-down.
4. Column settings allow you to select the columns you wish to include in your view.
5. The export button allows you to export the information in the Main Contract tab to Excel.

The first screenshot shows the 'Cost Management' interface with the 'BUDGET' tab selected. The 'MAIN CONTRACT' sub-tab is active. A table lists contracts with columns: Code, Name, Type, Qty, Unit, Unit Cost, Amount, Budget Code, Budget Name, Supplier Contract, Supplier, and Orig. Comm. A row for 'MC1' is shown with a 'Main Contract' type. A search column settings panel is open on the right, showing a list of columns to include or exclude. The second screenshot shows the 'Add' button in the top left corner of the table, which appears when in edit mode. The third screenshot shows the 'Add' button in the top left corner of the table, which appears when in edit mode. A dropdown menu is open for the 'Type' column, showing options: Unit Price, Cost Plus, and Fixed Price. A 'PRO TIP' is displayed on the right side of the interface.

PRO TIP: After a contract is created if you wish to edit you need to be in edit mode. If you choose to delete a contract or generate a document from a contract select the three-dots after the contract name.

Pay Applications

2

Creating the main/prime contract schedule of values (SOV)

You can either manually create the SOV or automatically create it from selected items within the Budget tab.

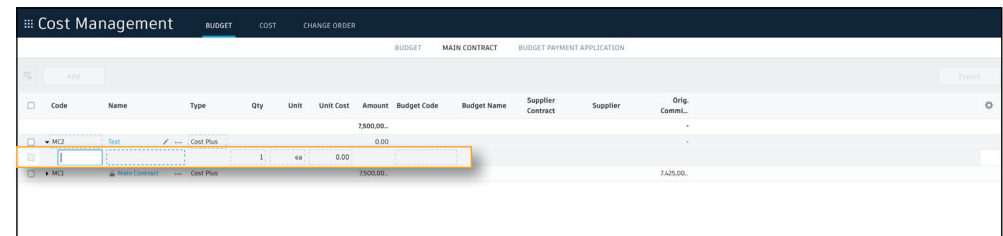
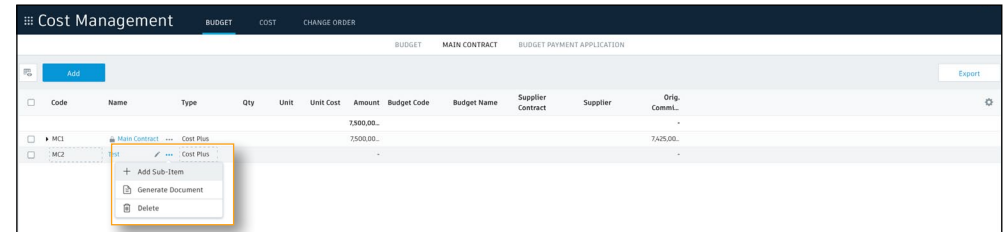
Manually Creating the SOV:

- Select the three-dots then “Add Sub-Item.”
- A new line will appear under the main contract, fill in the necessary information. You can type in a value or associate it to a budget code by selecting within the budget code column; the value will auto-populate.

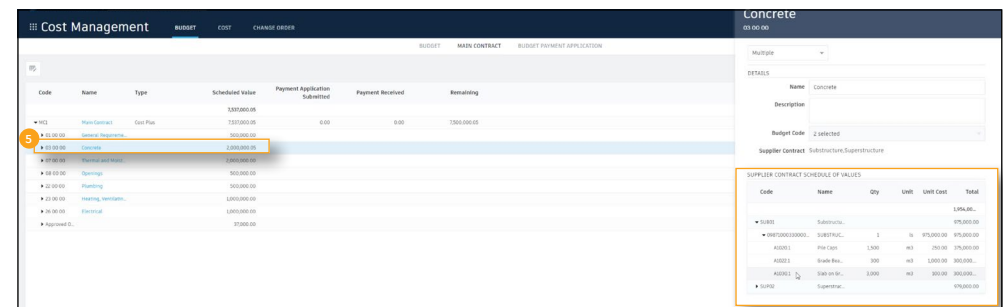
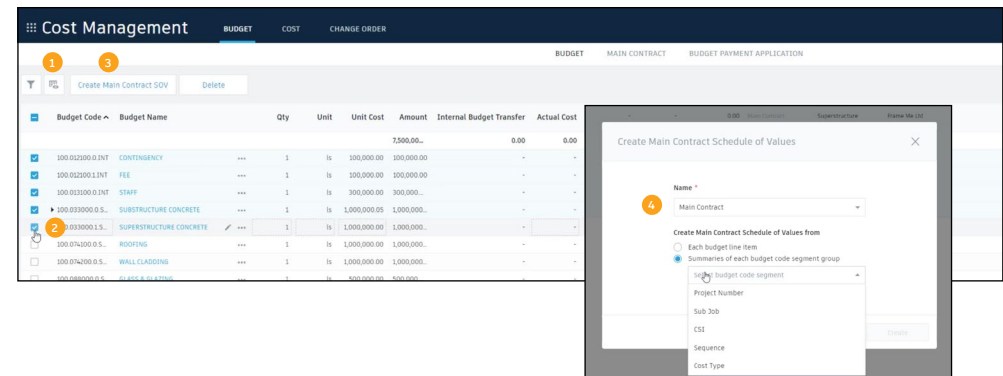
Automatically Creating the SOV:

1. Within the Budget tab, select the edit icon. In edit mode, a “Create Main Contract SOV” button will appear.
2. Select the budget items you would like to associate with the main contract.
3. Click “Create Main Contract SOV.”
4. Within the Create Main Contract SOV dialog box, select the main contract from the drop-down. Then choose what you want to create the SOV from; when done, click “Create.”
5. The main contract SOV will now be created automatically with links to the budget using the selected settings. This connection allows you to see what you will be paid and what you need to pay your Suppliers.

Manually Creating the SOV:



Automatically Adding the SOV:



Pay Applications

3

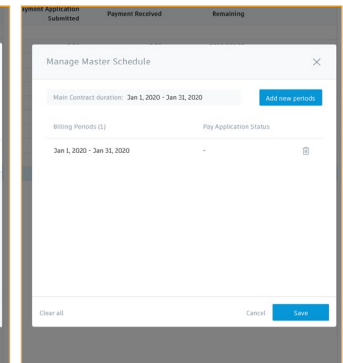
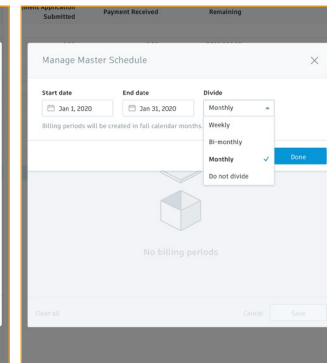
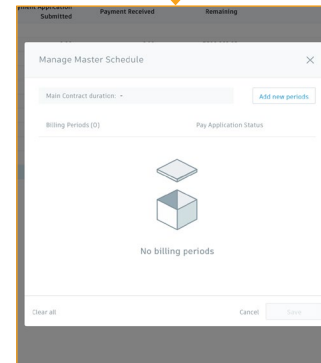
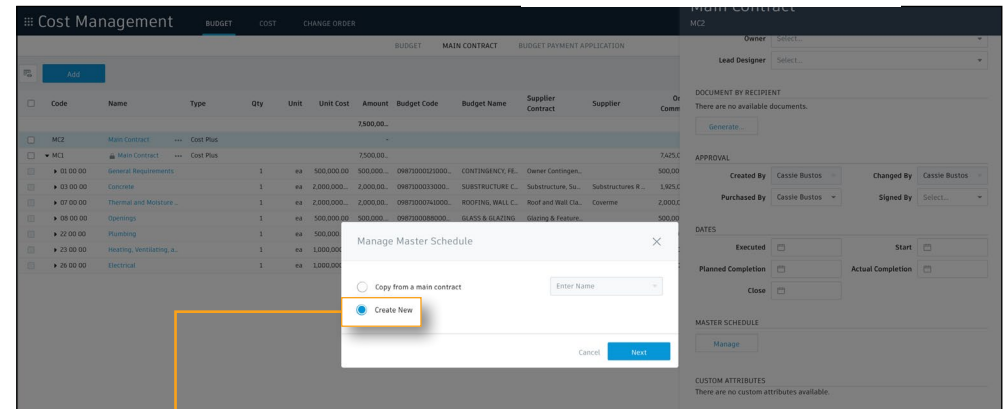
Creating billing periods/master schedule

You can either setup your billing periods from the main contracts details flyout panel or within the Budget Payment Application tab.

From Main Contract Details Flyout Panel:

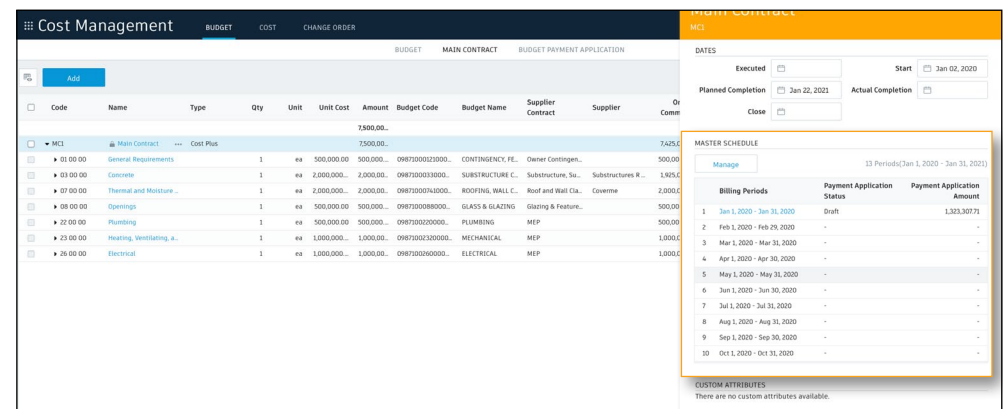
- Select the main contract to open the details flyout panel. Within the panel, scroll to the Master Schedule section and select the “Manage” button.
- In the Manage Master Schedule dialog box, you can either copy billing periods from another main contract using the drop-down menu or manually create new periods.
- Once your billing periods are created, you can manage them within the details flyout panel under the Master Schedule section. In this view, you can also see payment application statuses and amounts for each period.

From Main Contract Details Flyout Panel:



From Budget Payment Application Tab:

- Select the “Set up master schedule” button. Within the Manage Master Schedule dialog box, follow the same step as above.



Pay Applications

4

Managing Cost Payment Applications

Supplier payment applications can be managed from the Budget Payment Application tab within the Budget menu. They can also be managed in the Cost Payment Application tab within the Cost menu.

From Budget Payment Application Tab:

1. Use the drop-down menu to select the main contract.
2. Use the drop-down menu to choose the correct billing period or use the arrows to navigate between periods.
3. Select "View" next to Associated Cost Payment Applications. This will open the main contract details flyout panel.
4. In the Associated Cost Payment Application section, select "Create" to create a brand new cost payment application or select "Add existing" to connect an existing application to the contract.
5. Once created, the number of cost payments associated to the main contract will auto populate next to Associated Cost Payment Applications.
6. The cost payment application(s) will appear within the Associated Cost Payment Application section of the details flyout panel.
7. To update the cost payment application information, select the cost payment application billing period. This will take you directly to the cost payment application.

From Budget Payment Application Tab:

Create New: use the drop-down menu to select the supplier.

Add Existing: select the cost pay application from the provided list.

Pay Applications

Managing Cost Payment Applications (continued)

From Cost Payment Application Tab:

1. Use the drop-down menu to select the appropriate supplier.
2. Select “set up billing periods” and choose the appropriate option. If you decide to create from new, follow the same steps covered in section 3, “Creating billing periods/master schedule.”
3. Choose the correct billing period or use the arrows to navigate between periods.

Updating Cost Payment Application Information:

1. Click within the table to make necessary updates. The system will automatically update to reflect the changes.
2. Use the status drop-down to update the status of the pay application.
3. To export to Excel, select the Export button. This is useful if someone does not have access to the system. They can populate data into the yellow highlighted area; then, you can import the information back into the system.
4. To import data select the Import button.
5. To delete the pay application or allow overbilling, click the three-dot menu to access the options.
6. Approved Supplier Change Orders (SCO) will automatically be added based on the approved date. If you don't see one, select "Add change orders" to manually insert it.

From Cost Payment Application Tab:

The screenshot displays the 'Cost Management' application interface. At the top, there are tabs for 'BUDGET', 'COST', and 'CHANGE ORDER'. The 'COST' tab is active. Below the tabs, there are two main sections: 'CONTRACT' and 'COST PAYMENT APPLICATION'. The 'CONTRACT' section shows a table of contract items with columns for 'Contract Code', 'Contract Name', 'Supplier', and 'Status'. The 'COST PAYMENT APPLICATION' section shows a list of billing periods. A dialog box titled 'Manage Billing Periods' is open, showing options to 'Inherit from Master Schedule', 'Copy from a contract', or 'Create New'. The 'Inherit from Master Schedule' option is selected. The dialog also includes a 'Main Contract' dropdown and 'Cancel' and 'Next' buttons. The background shows a table of contract items and a list of billing periods.

Cost Management BUDGET **COST** CHANGE ORDER

Glazing & Feature Entrance

Search

Contract Code	Contract Name	Supplier	Status
MEP01	MEP		
CLA01	Roof and Wall Cladding	Coverme	
SUP02	Superstructure	Frame Me Ltd	
GLA01	Glazing & Feature Entran...		✓
CT02	Fee		
SUB01	Substructure	Substructures R Us	
GC001	Staff		
CT01	Owner Contingency		

Manage Billing Periods

☒ Inherit from Master Schedule ☐ Copy from a contract ☐ Create New

Main Contract
Enter Name

Cancel Next

There are no payment applications for this contract.

Set up billing periods

Cost Management BUDGET **COST** CHANGE ORDER

Glazing & Feature Entrance

1 Jan 1, 2020 - Jan 31, 2020

2 Jan 1, 2020 - Jan 31, 2020 ✓

3 Feb 1, 2020 - Feb 29, 2020

4 Mar 1, 2020 - Mar 31, 2020

5 Apr 1, 2020 - Apr 30, 2020

6 May 1, 2020 - May 31, 2020

7 Jun 1, 2020 - Jun 30, 2020

8 Jul 1, 2020 - Jul 31, 2020

9 Aug 1, 2020 - Aug 31, 2020

Manage billing periods

Updating Cost Payment Application Information:

[illegible]

Pay Applications

Managing Cost Payment Applications (continued)

Cost Payment Details Flyout Panel:

Select the payment application name to open the detail flyout panel.

1. Use the drop-down to update the status.
2. View a concise payment application summary table.
3. View a change order summary.
4. Quickly generate or access generated documents. This feature uses Cost Management document templates capabilities.
5. Quickly view the associated budget payment application. Select the billing period to open the budget payment application.
6. Available custom attributes display within this section.
7. Use these fields to attach relevant information.
8. Include any important notes.

Cost Payment Details Flyout Panel:

Substructure-PA001
SUB01-1

Multiple

DETAILS

Number	SUB01-1	Status	Search...
Name	Substructure-PA001	Accepted	
Description		Approved	
Contract	Substructure	Draft	✓
Billing Period	Jan 1, 2020 - Jan 31, 2020	Revise & Resubmit	
Supplier	Substructures R Us	Submitted	

2 PAYMENT APPLICATION SUMMARY

Original Contract Sum	975,000.00
Net Changed By Change Orders	0.00
Contract Sum To Date	975,000.00
Total Completed And Stored To Date	425,000.00
► Total Retention	42,500.00
Total Earned Less Retention	382,500.00
Less Previous Certificates For Payment	0.00
Current Payment Due	382,500.00
Balance To Finish Including Retention	592,500.00

3 CHANGE ORDER SUMMARY

Approved In Previous Periods	-
Approved This Period	0.00
Total	0.00

4 DOCUMENT BY RECIPIENT

1 document(s) generated on Jan 16, 2020 by Ian Turner [Show more...](#)

Archie Architect, Design Partnership (iain.360imperium+arch@gmail.com)

[Download](#)

[Regenerate...](#)

5 ASSOCIATED BUDGET PAYMENT APPLICATION

Main Contract	Billing Period	Status
Main Contract	Jan 1, 2020 - Jan 31, 2020	Draft

6 CUSTOM ATTRIBUTES

There are no custom attributes available.

7 ATTACHMENTS

Drag and drop files here or browse

[Select files from Document Management](#)

8 NOTES

Pay Applications

5

Managing Budget Payment Applications

Owner pay applications can be managed from the Budget Payment Application tab within the Budget menu.

Budget Payment Application Tab:

1. Use the drop-down menu to select the appropriate main contract.
2. Use the drop-down menu to choose the correct billing period or use the arrows to navigate between periods.
3. Column settings allow you to select the columns you wish to include in your view.
4. To delete the pay application or allow overbilling, click the three-dot menu to access the options.
5. Change orders automatically pull into the budget pay application view.
6. If you the change order select “Add change orders” to manually insert it.
7. Use the status drop-down to update the status of the pay application.

Budget Payment Application Tab:

Cost Management

BUDGET

COST

CHANGE ORDER

1

2

7

BUDGET

MAIN CONTRACT

BUDGET PAYMENT APPLICATION

4

Main Contract

Jan 1, 2020 - Jan 31, 2020

<

>

Draft

...

Associated Cost Payment Applications: 2

View

General		Scheduled Value				From Previous Application				This Period				Total Work Completed				This Application				Completed and Stored	
Number	Name	Qty	Unit	Unit Cost	Amount	Qty	Unit Cost	Amount	%	Amount	Total	Qty	Unit Cost	Amount	%	Qty	Unit Cost	Amount	%	Amount	Total	%	
MCI-1	Main Contr.				7,537,000.00																		
01 00 00	General Bldg.	1	ea	500,000.00	500,000.00	0	-	-	0	-	-	0	500,000.00	0.00	0	0	0	0.00	0	-	0	0.00	0
09870000	CONTINGEN.	1	ea	100,000.00	100,000.00	0	-	-	0	-	-	0	100,000.00	0.00	0	0	0	0.00	0	-	0	0.00	0
09870000	FEE	1	ea	100,000.00	100,000.00	0	-	-	0	-	-	0	100,000.00	0.00	0	0	0	0.00	0	-	0	0.00	0
09870000	STAFF	1	ea	300,000.00	300,000.00	0	-	-	0	-	-	0	300,000.00	0.00	0	0	0	0.00	0	-	0	0.00	0
03 00 00	Concrete	1	ea	2,000,000.00	2,000,000.00	0	-	-	0	-	-	0.72	2,000,000.00	1,435,897.46	71.79	0.72	2,000,000.00	1,435,897.46	71.79	-	-	-	-
09870000	SUBSTRUC.	1	ea	1,000,000.00	1,000,000.00	0	-	-	0	-	-	0.44	1,000,000.00	435,897.46	43.59	0.44	1,000,000.00	435,897.46	43.59	-	-	-	-
09870000	SUPERSTR.	1	ea	1,000,000.00	1,000,000.00	0	-	-	0	-	-	1	1,000,000.00	1,000,000.00	100	1	1,000,000.00	1,000,000.00	100	-	-	-	-
07 00 00	Thermal an.	1	ea	2,000,000.00	2,000,000.00	0	-	-	0	-	-	0	2,000,000.00	0.00	0	0	0	0.00	0	-	0	0.00	0
09870000	ROOFING	1	ea	1,000,000.00	1,000,000.00	0	-	-	0	-	-	0	1,000,000.00	0.00	0	0	0	0.00	0	-	0	0.00	0
09870000	WALL CLAD.	1	ea	1,000,000.00	1,000,000.00	0	-	-	0	-	-	0	1,000,000.00	0.00	0	0	0	0.00	0	-	0	0.00	0
08 00 00	Openings	1	ea	500,000.00	500,000.00	0	-	-	0	-	-	0	500,000.00	0.00	0	0	0	0.00	0	-	0	0.00	0
09870000	GLASS & GL.	1	ea	500,000.00	500,000.00	0	-	-	0	-	-	0	500,000.00	0.00	0	0	0	0.00	0	-	0	0.00	0
20 00 00	Plumbing	1	ea	500,000.00	500,000.00	0	-	-	0	-	-	0	500,000.00	0.00	0	0	0	0.00	0	-	0	0.00	0
09870000	PLUMBING	1	ea	500,000.00	500,000.00	0	-	-	0	-	-	0	500,000.00	0.00	0	0	0	0.00	0	-	0	0.00	0
20 00 00	Heating, Wh.	1	ea	1,000,000.00	1,000,000.00	0	-	-	0	-	-	0	1,000,000.00	0.00	0	0	0	0.00	0	-	0	0.00	0
09870000	MECHANIC.	1	ea	1,000,000.00	1,000,000.00	0	-	-	0	-	-	0	1,000,000.00	0.00	0	0	0	0.00	0	-	0	0.00	0
20 00 00	Electrical	1	ea	1,000,000.00	1,000,000.00	0	-	-	0	-	-	0	1,000,000.00	0.00	0	0	0	0.00	0	-	0	0.00	0
09870000	ELECTRICAL	1	ea	1,000,000.00	1,000,000.00	0	-	-	0	-	-	0	1,000,000.00	0.00	0	0	0	0.00	0	-	0	0.00	0
Change Orders					31,000.00																		
0-0001	ACQ #...	1	1/4	31,000.00	31,000.00	0	-	-	0	-	-	0.84	31,000.00	31,000.00	83.78	0.84	31,000.00	31,000.00	83.78	-	-	-	-
01	Additional...	1	1/4	22,000.00	22,000.00	0	-	-	0	-	-	1	22,000.00	22,000.00	100	1	22,000.00	22,000.00	100	-	-	-	-
02	Flaming - R...	1	1/4	9,000.00	9,000.00	0	-	-	0	-	-	1	9,000.00	9,000.00	100	1	9,000.00	9,000.00	100	-	-	-	-
03	Down - Rep...	1	1/4	6,000.00	6,000.00	0	-	-	0	-	-	0	6,000.00	0.00	0	0	0	0.00	0	-	0	0.00	0

Add change order

Search columns

General

Number

Name

Scheduled Value

Qty

Unit

Unit Cost

Amount

From Previous Application

Work Completed

Qty

Unit

Unit Cost

Reset

Pay Applications

Managing Budget Payment Applications (continued)

Main Contract Details Flyout Panel:

Select the main contract to open the detail flyout panel.

1. Use the drop-down to update the status.
2. View a concise payment application summary table.
3. View a summary of the change orders.
4. Quickly generate or access generated documents. This feature uses Cost Management document templates capabilities.
5. Within this section, you can create or add existing cost payment applications. To quickly access the cost payment application details, select the billing period. The cost payment application will open.
6. Available custom attributes display within this section.
7. Use these fields to attach relevant information.
8. Include any important notes.

Updating Budget Payment Application Summary View:

- Within the Budget Payment Application table, select "Updated Budget Payment Application" to automatically update the summary view.
- Note, associated cost payment applications must have a status of Accepted before you see the option to update.

Main Contract Details Flyout Panel:

Main Contract-PA001
MC1-1

Multiple

DETAILS

Number: MC1-1 Status: Search...

Name: Main Contract-PA001 Approved

Description: Draft

Main Contract: Main Contract Paid

Billing Period: Jan 1, 2020 - Jan 31, 2020 Revise & Resubmit

Submitted

PAYMENT APPLICATION SUMMARY

Original Main Contract Sum	7,500,000.05
Net Changed By Change Orders	37,000.00
Main Contract Sum To Date	7,537,000.05
Total Completed And Stored To Date	1,466,897.46
Total Retention	143,589.75
Total Earned Less Retention	1,323,307.71
Less Previous Certificates For Payment	0.00
Current Payment Due	1,323,307.71
Balance To Finish Including Retention	6,213,692.34

CHANGE ORDER SUMMARY

Approved In Previous Periods	-
Approved This Period	37,000.00
Total	37,000.00

DOCUMENT BY RECIPIENT

There are no available documents.

Generate...

ASSOCIATED COST PAYMENT APPLICATIONS

Create Add existing

Contract	Supplier	Billing Period	Status	Payment Requested
				1,266,500.00
Substructure	Substructur...	Jan 1, 2020 - Jan 31, 2020	Draft	382,500.00
Superstruct...	Frame Me Ltd	Jan 1, 2020 - Jan 31, 2020	Accepted	884,000.00

Update Budget Payment Application

Associated cost payment applications must be Accepted first.
Last Updated: Jan 14, 2020 1:39 PM by John Sanner

CUSTOM ATTRIBUTES

There are no custom attributes available.

ATTACHMENTS

Drag and drop files here or browse

Select files from Document Management

NOTES

Updating Budget Payment Application Summary View:

Cost Management

Budget Main Contract Budget Payment Application

Main Contract: Jan 1, 2020 - Jan 31, 2020 Draft

Associated Cost Payment Applications: 2

General	Schedule Value	Work Completed	Materials	Total	Work Completed	Materials	Total										
Number	Name	Qty	Unit	Unit Cost	Amount	Qty	Unit	Unit Cost	Amount	Qty	Unit	Unit Cost	Amount	Qty	Unit	Unit Cost	Amount
MC1-1	Main Contract				7,537,000.05				1,466,897.46	394			1,466,897.46	394			1,466,897.46
10100000	General Reg.	1	HA	500,000.00	500,000.00	0		0	0	0		0	0	0		0	0
10100001	CONCRETE	1	HA	500,000.00	500,000.00	0		0	0	0		0	0	0		0	0
10100002	FR	1	HA	500,000.00	500,000.00	0		0	0	0		0	0	0		0	0
10100003	FORM	1	HA	500,000.00	500,000.00	0		0	0	0		0	0	0		0	0
10100004	Concrete	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100005	Substructure	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100006	Superstructure	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100007	WALL CLASH	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100008	CONCRETE	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100009	FR	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100010	FORM	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100011	Concrete	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100012	Substructure	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100013	Superstructure	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100014	WALL CLASH	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100015	CONCRETE	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100016	FR	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100017	FORM	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100018	Concrete	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100019	Substructure	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100020	Superstructure	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100021	WALL CLASH	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100022	CONCRETE	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100023	FR	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100024	FORM	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100025	Concrete	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100026	Substructure	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100027	Superstructure	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100028	WALL CLASH	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100029	CONCRETE	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100030	FR	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100031	FORM	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100032	Concrete	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100033	Substructure	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100034	Superstructure	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100035	WALL CLASH	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100036	CONCRETE	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100037	FR	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100038	FORM	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100039	Concrete	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100040	Substructure	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100041	Superstructure	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100042	WALL CLASH	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100043	CONCRETE	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100044	FR	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100045	FORM	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100046	Concrete	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100047	Substructure	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100048	Superstructure	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100049	WALL CLASH	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100050	CONCRETE	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100051	FR	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100052	FORM	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100053	Concrete	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100054	Substructure	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100055	Superstructure	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100056	WALL CLASH	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100057	CONCRETE	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100058	FR	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100059	FORM	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100060	Concrete	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100061	Substructure	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100062	Superstructure	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100063	WALL CLASH	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100064	CONCRETE	1	HA	1,000,000.00	1,000,000.00	0		0	0	0		0	0	0		0	0
10100065	FR	1	HA	1,00													

Pay Applications

6 Document Generation

- Cost Management allows you to create standard documentation formats that automatically populate directly from the system. See the Document Templates chapter of this guide for details on how to access the document templates and create your own.
- For example, you can automatically generate a payment document which provides the information required to populate documents such as the AIA G702-1992 and AIA G703-1992 forms.

Example Document Generated from Cost Management:

AutoSave OFF Cost payment sample document template 3[1] - ... Saved to my Ma

ert Draw Design Layout References Mailings Review View Acrobat Share

B I U x₂ x² Paragraph Styles Sensitivity Create and Share Adobe PDF Request Signatures

Application and Certificate on Payment

OWNER: PROJECT: Ian Phase 2 Testing APPLICATION NO: SUB01-1
PERIOD TO: 2020-01-31
FROM CONTRACTOR: VIA ARCHITECT: CONTRACT DATE: Dec 10, 2019
PROJECT NOS:

Payment details:

ITEM NO.	DESCRIPTION OF WORK	SCHEDULED VALUE	WORK COMPLETED		MATERIALS PRESENTLY STORED (Net in D or E)	TOTAL COMPLETED (D+E+F)	% (G + J)	BALANCE TO FINISH (C - G)	RETAINAGE (If variable rate)
			FROM PREVIOUS APPLICATION	THIS PERIOD					
0987100033000	SUBSTRUCTURE CONCRETE	975,000.00		425,000.00		425,000.00	43.59	550,000.00	42,500.00
1-A1020.1	Pipe Caps	375,000.00		125,000.00		125,000.00	33.33	250,000.00	12,500.00
1-A1022.1	Grade Beams	300,000.00		150,000.00		150,000.00	50.00	150,000.00	15,000.00
1-A1030.1	Slab on Grade	300,000.00		150,000.00		150,000.00	50.00	150,000.00	15,000.00
	GRAND TOTAL	975,000.00		425,000.00		425,000.00	43.59	550,000.00	42,500.00

Application is made for payment, as shown below, in connection with the Contract:

1. ORIGINAL CONTRACT SUM \$ 975,000.00
2. NET CHANGE BY CHANGE ORDERS \$ 0.00
3. CONTRACT SUM TO DATE (Line 1 + 2) \$ 975,000.00
4. TOTAL COMPLETED & STORED TO DATE \$ 425,000.00
5. RETAINAGE:
a. 10.00 % of Completed Work \$ 42,500.00
b. % of Stored Material \$ 0.00
Total Retainage (Lines 5a + 5b) \$ 42,500.00
6. TOTAL EARNED LESS RETAINAGE \$ 382,500.00
(Line 4 minus Line 5 Total)
7. LESS PREVIOUS CERTIFICATES FOR PAYMENT \$
8. CURRENT PAYMENT DUE \$ 382,500.00
9. BALANCE TO FINISH, INCLUDING RETAINAGE \$ 592,500.00
(Line 3 minus Line 6)

Change order summary:

CHANGE ORDER SUMMARY	ADDITIONS	DEDUCTIONS
Total changes approved in previous period	\$	\$
Total approved this period	\$ 0.00	\$
TOTAL	\$ 0.00	\$
NET CHANGES by Change Order	\$ 0.00	

Additional Capabilities

Account Admin

With the project administration tools in BIM 360, you can rest assured that your project information is in the right hands. Project admins can easily invite team members to the project and define their access levels on a project-by-project basis with a simple click. BIM 360 has two levels of administration to ensure security and control across your projects: Account admins and project admins. Only account admins can create new projects and assign additional account admins and project admins. Project admins can add and remove members, set permissions, and adjust project details.



1

Create a project

- In the Account Admin module, select the Projects tab and click “Add.”
- Enter project information and click “Save & Continue.”

Getting Started Guide 

Create a Project 

Create Project Profile

Step 1 of 2

* Project Name

Project name is valid.


* Project Type

Construction Type

* Project Value

Project value is valid.

Project Image



Select image to upload
JPEG, GIF, PNG, or BMP file
(4MB max)

Browse

Project Address

Account Admin

2 Activating modules

- Click “Activate” for the desired BIM 360 service.
- Assign a project admin for each service. You can add multiple admins.
- (Optional) For Document Management and Field you can copy existing project settings.
- An email invitation will be sent to the assigned project admin(s). They will need to click the link to join the project.
- Click “Finish.”

Activate Services
Step 2 of 2

To activate a service, click Activate and assign at least one project admin to the service. When you assign a project admin, an email invitation will be sent to the admin. Project admins manage all project level administration for their service. For example, a BIM 360 Field project admin can copy projects, create and manage checklists, and invite companies and project team members to their projects. [Hide](#)

Document Management
Inactive

Copy project settings ([Learn more](#))

Select Project

All Projects

- 01&03
- AU 2017 AR Demo project
- Alameda High School
- Alpine Retreat
- BZ Migration Testing
- Bayfront Arena
- Bio Compaanv Tower

Please assign a project administrator

Enter name or email address

Company

Cancel Save

Activate

Design Collaboration
Inactive

Activate

BIM 360 Glue
Inactive

Activate

PRO TIP: You have to activate Document Management first, before you can activate other next-gen services.

3 Add members to directory

- In the Account Admin module select the Members tab and click “Add.”
- To add an individual member, select “Add People to the Member Directory.”
- To add an account admin, select “Invite Account Admins.”
- To import members from a list, select “Import Members by Spreadsheet.” For a first-time import, download and complete the member list template.

Invite Account Admin

To invite new Account Admins to manage your account, enter their email addresses, and select Account Admin in the Access Level dropdown. The Account Admins will receive invitation emails with links to BIM 360 administration.

Invite Account Admins to manage your account. Add

Email	*Default Company	Default Role	Access Level
test@autodesk.com	Autodesk	Select Role Select Role Architect Construction Manager Contractor Designer Document Manager Engineer Estimator Executive	Account Admin Account Admin Executive Overv

Cancel Invite

PRO TIP: You can change the default company and role later if necessary.

Account Admin

4 Adding members to a project & assigning access levels

- In the “Project Admin” module, select the “Members” tab.
- Click “Add” and use the search bar to search the member directory.
- When you find the member, select them and click “Select.”
- Add their company and role. Note: Role determines their access level to all BIM 360 services.
- Click the icon(s) to overwrite the access level granted by their project role.
- Click “Add to Project.”
- Update existing access levels by clicking the grayed out icon(s).

Add Project Members

Cancel Add to Project

Enter Names or Email Addresses Select

Name/Email	Company	Roles	Project Admin					
Rick Nichols	Aesthetic Interiors	Owner						
Ben Johnson	General Construction	Construction Manager						
b1m360user7@yahoo.com	Ace Property Holdings	Construction Manager						
b1m360user6@yahoo.co...	Sparxx Electrical	Engineer						
b1m360user8@yahoo.oc...	General Construction	Superintendent						

Members & Access Levels

Setup Roles

PRO TIP: You can choose from a list of preset roles or create your own custom roles as well as configure the permission and access levels by each role.

Integration Partners

Get the most out of construction technology by integrating the software you already use with BIM 360. Built on an open and secure API platform, BIM 360 enables users to easily integrate with various other construction softwares, including drone technology, estimating and bid management, as well as safety management tools.



Reality Capture

Cost Management

Estimating

Construction Management

Takeoff

Design Checking

Field Management

Layout

Bid Management

Scheduling

Accounting

Data Transfer

[Learn More](#)



3DR

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ESTIMATES

eSUB
construction software

Pype

SMARTBID™

EGNYTE

hsbCAD

STRATUS

SITEAWARE

assemble

ManufactOn

triax™

hsbshare

SMARTVID.IO

RM
EX RHUMBIX

HOLO
BUILDER
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